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ABSTRACT

This handbook offers a practical set of ideas to help all types of libraries in the task of marketing their services in an increasingly competitive economy and provides a model program as urged by the White House Conference on Library and Information Services. It is aimed at adult information services in particular, with passing references to children's services, literacy training, and other library services. Part 1 contains three chapters; the initial chapter provides information on how to use the handbook, with a six-step program for marketing libraries. The second and third chapters extend some key findings and discuss developing a marketing program in general. Part 2 contains six chapters that review the following: (1) self-assessment; (2) market definition; (3) product planning; (4) product creation; (5) selling; and (6) closing the loop. Part 3 then analyzes the special needs of different types of libraries, from academic through corporate, government, institutional, law, medical, public, and school libraries. Two appendixes discuss the influence of technology on library marketing and marketing surveys. Twenty-seven exhibits and sample forms are attached. (Contains 59 references.) (SLD)

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Marketing & Libraries DO Mix

A Handbook for Libraries & Information Centers

The State Library of Ohio
65 South Front Street, Columbus, Ohio 43266-0334

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Marketing & Libraries **DO** Mix

A Handbook for Libraries and Information Centers

The State Library of Ohio
Columbus, Oh 43266-0334

and

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FOREWORD

This handbook is in itself a product of the marketing process. It began with an expression of *needs* - in this case addressed to the State Library of Ohio by the umbrella professional group OCLIS (Ohio Council of Library and Information Services). From these conversations came a roughed-out product design. It would be a practical, direct document that could help all types of libraries to improve their effectiveness by adopting the marketing idea. That is, it would help them serve their "customers" in a better, more efficient and more market-driven way. Meeting the needs of the customer — a term used throughout this handbook — results in better service and usually leads to better support for libraries.

The concept of a marketing handbook was to become a reality through the following 7-step process;

Preparation of handbook draft
Review of draft by library committees
Revision of draft
Working test at selected Ohio library sites
Further review by library committees
Final draft revisions
Publication by The State Library of Ohio

To implement the process the State Library sought bids from authors who could combine library and information experience with knowledge of how marketing works in industry. The bid selected was that of Western Reserve Associates, a marketing and consulting firm in Cleveland Heights, Ohio, with extensive experience in the public and private sectors.

WRA's authorship team is described at the back of this book. Yet as talented as these authors are, the handbook could not have been developed without the extensive cooperation of the Ohio library community. Over 85 librarians volunteered for the eight types of library committees which reviewed the drafts and added greatly to the final product. Seventeen libraries actually field-tested the evolving handbook. In a period of about five months these libraries carried through a complete marketing project based on the draft handbook. Their enthusiasm, suggestions for improving the draft and strong positive comments about the marketing process have helped ensure that the handbook will make an important contribution to the function of libraries and information centers.

As the creative process neared completion it became clear that marketing concepts are compatible with the means and objectives of libraries and information centers. Hence, the title was changed to

Marketing and Libraries *Do* Mix

Bill Crowley, Deputy State Librarian for Library Services must be singled out for special praise. He supervised the whole project from conception through the innumerable stages of creation and production. He also worked closely with the many State Library staff members — most notably, Jane Byrnes who edited the *Handbook*, Sharon Boyer, who facilitated many *Handbook* development efforts, Darla Cottrill, who provided statistical support, and Barb Baileys who set the text via desktop publishing — who contributed so greatly to the project.

Marketing is inseparable from growth and success in the information age. Using it, libraries will make an even greater contribution to the growth of America.

Richard M. Cheski
State Librarian

PREFACE

All libraries do some sort of marketing. It is the intention of this book to provide a practical set of ideas to help all types of libraries in the urgent task of marketing themselves in an increasingly competitive economy. There are few more important tasks than helping society make good use of information that accumulates so quickly. Libraries are in the thick of that game and must fight even harder to maintain a commanding position.

The State Library of Ohio commissioned this handbook with funds from the Library Services and Construction Act (LSCA). In preparing the objectives of the handbook and the project that created it, the State Library relied on the assistance of the Ohio Council of Library and Information Services (OCLIS).

While this book has been prepared for use by Ohio libraries, it is broad in origin since examples of good library practice were drawn from many states. A national perspective is fitting since library marketing became one of the most important topics at the White House Conference on Library and Information Services (WHCLIS) in July, 1991. 700 delegates voted on the issues that had the greatest importance to them and marketing placed fourth of the 15 top subject areas. Specifically, the recommendation was:

> "That model programs be created to market libraries to their public, emphasizing the library as a resource to meet educational, business and personal needs. The models should promote all elements and components of the library community..."

The intention of this handbook is to provide a model program as urged by WHCLIS. By request, however, it is aimed particularly at *adult information services*, an element common to academic, public, school and special libraries. Therefore, only passing reference is made to children's services, literacy training and so many other things libraries do well.

This handbook is not intended to be a government relations handbook to persuade state, county and local officials to maintain certain levels of financial support. It is the task of this handbook to provide a means of serving customers better and thereby serving the society and the economy better. This will build a broad level of overall support for libraries/information centers.

Industrial marketing ideas and terms are found throughout this handbook. The industrial marketing model has long been familiar to libraries but many have steered clear of it, seeing it as somehow inappropriate. That really is no longer true, and as the title of this book puts it, **Marketing and Libraries *Do* Mix**.

CHAPTER 1
HOW TO USE THIS BOOK

What is marketing?

Marketing is not the same as selling, though the words are often used interchangeably. Selling, however, is an important part of marketing.

Marketing is finding out what your customers want and, within limits, providing it.

MARKETING SHORT COURSE

One of America's top marketers offers a short course in marketing including themes which recur throughout this book. Here it is:

1. **Know who your customers are,** or potentially are. This is more difficult than it sounds.

2. **Know who/what your competition is.** If users don't buy your product, what other product (perhaps rather different from your present product) would they buy?

3. Be able to **verbalize what it is your customer will get only from you;** if s/he doesn't buy your product, s/he can't get this.

4. **Know what you feel good about selling;** what fits with the character of your business.

Laurel Cutler, worldwide director of marketing and planning at Foote, Cone & Belding, former Chrysler Corporation VP - consumer affairs.

USING THE WHOLE BOOK

There is something for everyone in this handbook. All of the usual library types are represented and all sizes of library should be able to find useful information.

The Six-Step Program

Part II of this handbook is a step-by-step description of how to prepare a marketing program. Six steps are described and libraries should be able to set up and apply the whole program. Actually, most libraries are already carrying out many elements of a marketing program and therefore they may choose to pick up only some of the six steps.

While the six-step program is of general interest, Part III contains specific information and ideas for various library types. We have stayed with the standard designations, namely:

Academic	Law
Corporate and Other Special	Medical
Government	Public
Institution	School Libraries/Media Centers

Each chapter includes ideas gained from discussions with library staffs, teachers and trustees. In many cases actual samples of survey forms and other useful work pieces are provided. Some items can be used directly, while others should be modified to meet special requirements.

A sample of a complete model library marketing plan is presented as Exhibit 1-A found in the exhibit section at the back of the book. Exhibit numbers are based on the first chapter in which an exhibit is mentioned.

Read the Whole Book

Whatever type of library you represent, you should **read the whole book**. There is a unity in libraries that means each type can learn from all others.

This book will be used in different ways by different readers. Some will use the six steps offered and prepare a thorough marketing plan. Others will pick up some of the sample questionnaires or other materials and use them with modification for local needs. Some readers may even disagree with everything they see and thereby stimulate their own thinking in a positive direction. And some readers may well be agitated enough to write a better text than this.

We hope no one who picks up this volume will be totally unmoved since libraries of all kinds must do everything they can to remain competitive and provide their many essential services in this information age.

The Influence of Technology

Throughout this handbook there are mentions of how computers, storage, imaging and other technologies can influence library operations. Libraries can make especially good use of these growing electronic opportunities. For smaller libraries this is particularly true, since so much can now be accomplished with a simple PC system. Furthermore libraries must learn to exploit technology. It is no longer an option.

Because technology is of such importance, a summary of its effect on the very nature of libraries is presented as Appendix A, "Influence of Technology on Library Service." Before going any further, please read Appendix A.

CHAPTER 2
SOME KEY FINDINGS AND SUGGESTIONS

As libraries review their marketing programs and in many cases improve them, there are a number of general statements to consider. Here are some of them which are covered in this handbook:

MARKETING

- Modern marketing provides for the substitution of research-based planning for intuition and guesswork.
- INFORM and PERFORM are two important actions in marketing: Telling customers about available services and providing the expertise and support to make those services work.
- Marketing always requires choices of what services should be provided. No institution can do everything.

MARKETING vs PUBLIC RELATIONS

- Marketing focuses on the customer; public relations views the organization in reaction to the external environment.
- Public relations is just one part of the selling process. It is not just press releases but is, for better or worse, part of every contact between staff and customers.
- Public relations, making the library's resources known to the community, is by itself a service of the library.

CUSTOMER FOCUS

- Libraries serve customers. They should always be treated as customers though they may be called patrons or readers or users.
- Marketing is not solely for the purpose of providing customers with new services. It must also reinforce and improve existing services.
- Librarians must understand and identify with the users they serve. Corporate librarians must identify with the corporation. Medical librarians must identify with doctors, hospitals and patients.
- Response to customer needs must be in the most appropriate format and through the most convenient delivery mechanism.

STAFF FOCUS

- For marketing to succeed, EVERYONE must buy into the concept and participate and should be kept abreast of the plans and projects.
- Librarians should remember they are employed not just to run a library, but to serve the information needs of customers.
- Staff must be active, not passive in responding to requests.

PRODUCT FOCUS

- "Library" as a term does not convey fully the newer services available. School, academic and corporate libraries have in many cases added to their title words such as "media" or "information." Public libraries should do the same.
- Dividing libraries by type can be very limiting. Public, law, medical and academic librarians may each meet in their own groups, but actually reference librarians in all of them may have more in common.
- Product, Price, Place, and Promotion are the eternal quadrangle of marketing.

WHO PAYS?

- Public libraries are free almost as an American birthright, but special services may result in special charges.
- Public libraries aid their public sources of financial support by providing the best, most customer-focused service.
- Special libraries must constantly add up their costs to compare them with tangible benefits provided. Otherwise they are in danger of being classed as mere overhead.

COMPETITION

- In their adult information services, libraries operate in an increasingly competitive environment. There are more sources of information and more routes by which it can get to the users.
- Customers are not captives. They will go elsewhere if not satisfied.

TECHNOLOGY & RENEWAL

- New technologies can offer more service to library customers, but they may also provide the means of circumventing the library.
- Customer needs and expectations change, which means no successful marketing program will remain fixed for long.

CHAPTER 3
DEVELOPING A MARKETING PROGRAM

"Grace is given by God, but knowledge is
bought in the *market*."

Arthur H. Clough

Marketing library services consists of the same elements found in marketing all kinds of goods and services. This does not mean that library marketing is identical to marketing computers, or fast food, or dry cleaning or cans of corn. But the same elements must exist in any successful marketing plan. Just because a plan contains every element does not guarantee its success, but there is a greater chance of failure if it does *not* contain all of them.

WHAT MARKETING IS & ISN'T

It is important to establish what library marketing is *not*. It is not equivalent to public relations. Although good PR is normally a part of any successful marketing program, you can do a good job of public relations, but a bad job of marketing. It is more than dissemination of information about coming events or available information services, although customers must be told what you have to offer. Nor is it about the installation of the latest technology for cataloging or for data base access. All of these activities may be necessary to survive in the future, but they should be the results of executing the marketing plan you create and set in motion.

Planning a marketing program does not require that you ignore PR concerns. Including those staff members with PR responsibilities from the start may help define products and services with greater customer appeal. Waiting until a product is ready for the marketplace before considering the PR aspect makes little sense.

Six Elements of Marketing

Marketing does consist of several elements, all of which must exist and interact if you are to successfully complete this marketing endeavor.

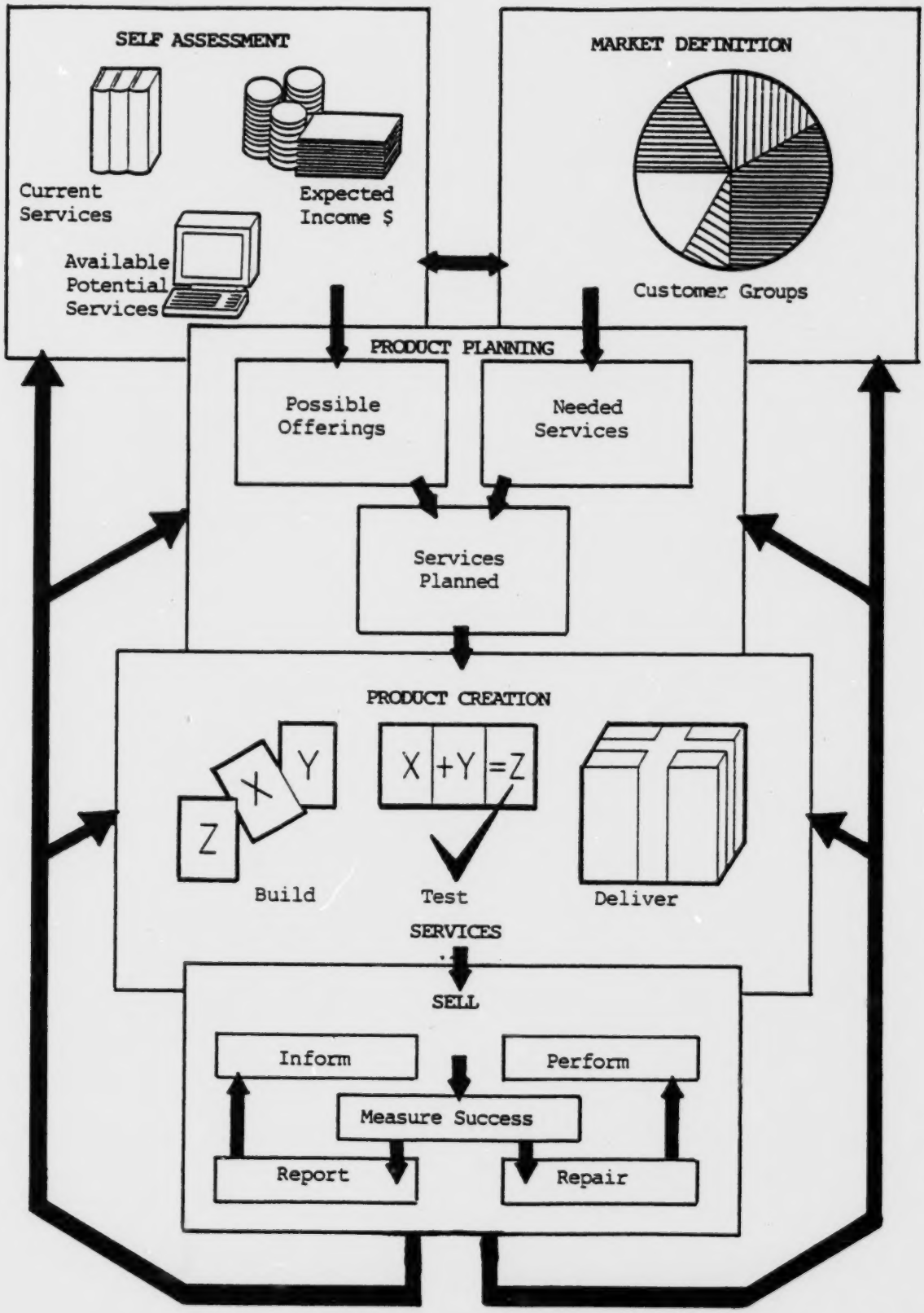

SELF ASSESSMENT
Current Services
Expected Income $
Available Potential Services
MARKET DEFINITION
Customer Groups
PRODUCT PLANNING
Possible Offerings
Needed Services
Services Planned
PRODUCT CREATION
X
Y
Z
Build
X +Y =Z
Test
Deliver
SERVICES
SELL
Inform
Perform
Measure Success
Report
Repair

Figure 3-A

As depicted in Figure 3-A, those elements are:

self-assessment	-	evaluating the strengths and weakness of your organization.
market definition	-	deciding what groups of customers you will serve, and which have priority.
product planning	-	determining what services your customers want and need and how you will provide them.
product creation	-	building the products defined in your plan with an emphasis on quality.
selling	-	informing your customers of your services, getting them "in the door," and performing with excellence.
closing the loop	-	embedding marketing in your organization's way of doing business.

If the elements seem out of sequence, remember that your current status as an established, a fledgling, or a not-yet-started library will determine where you start in the process. You may already be expert in some marketing activities. Set a goal of becoming expert in all of them.

Examine your own ideas about marketing. Perhaps you would have defined marketing as simply selling your library's services. But it entails a series of connected tasks that your organization almost certainly has contemplated individually at various times. You may never have connected them in a continuous set of activities. And if the very idea of library marketing is somehow distasteful, something to be avoided, it is time to change your way of thinking.

Marketing and Planning

Some of the elements of marketing sound like topics for strategic or long-range planning. You may have developed a strategic plan that included customer surveys, or resulted in the creation of new services. Why then is a marketing program different from that strategic planning and the roadmap it produced?

The answer involves *execution*. A marketing program certainly requires planning, but your success will depend on how well you execute that plan and how you turn it into customer-oriented services delivered by knowledgeable, well-trained staff members. For marketing to be effective, flexibility and the willingness to adapt your plan to meet changing conditions will also be crucial to that success. So if you just want to plan how to market, a book on planning will do. This book aims at getting libraries to accept marketing as an integral and permanent part of the way they get things done.

Marketing: An Extra Cost?

As you execute your plan, you may well spend more money on marketing than you do now or you may spend less through more effective use of funds. Do not assume that a marketing program *demands* costly and complex new services. An analysis of your customers' requirements may lead you to enhance existing services, to repackage something old with something new, or quite possibly to drop specific services altogether. Marketing should help you make smarter decisions about how to allocate what resources you have to produce solutions your customers will value. Money you spend on marketing must inevitably be related to real benefits for your customers.

The six elements we will discuss are, to some extent, already part of what your library does. You have, in a sense, a marketing program now, but it may be incomplete or incohesive. A desire to improve each element is needed for your success.

So accept now that marketing is not a frivolous extra, but a necessity. For many libraries it will be a question of survival. If you are still thinking that you can do without marketing entirely, you have missed the point. Marketing ensures that you will give your customers what they need, to the best of your ability.

COMPETITION FOR CUSTOMERS

Erase from your thinking any idea that marketing is unnecessary for your library because you are somehow protected. Whether you have recognized it or not, the competition is out there. Customers looking for more current information than their public library provides can be lost to commercial suppliers of information. Specialty libraries with declining support within their organizations may find their funding reallocated to be used at departmental discretion to satisfy needs for unique materials or to acquire information directly from other libraries. If you believe in the value of your organization and its services, it is absolutely necessary that you strengthen them and validate their worth for your customers. The result of ignoring the needs of your customers will be that they will become someone else's customers.

Responding to customer requirements is not a new idea; the Ohio Library Association's conference theme in 1990 was "Let's Hear It for the Customer." It is a theme worth emphasizing every year.

Are you still with us? Then let's examine in more detail the elements of the plan you are going to develop.

Summary: Developing a Marketing Program

* Marketing is not the same as public relations or selling, but they are part of the marketing process.

* Marketing consists of six elements:

  - Self-assessment
  - Market definition
  - Product planning
  - Product creation
  - Selling
  - Closing the loop

* While marketing requires good planning, the execution of the plan and the integration of marketing into daily library activities are essential for success.

* Recognize that every library faces competition and must react to it. There are no safety zones on the information highway.

CHAPTER 4
SELF-ASSESSMENT

"Where shall I begin, please your Majesty?"
he asked.

"Begin at the beginning," the King said, gravely,
"and go on til you come to the end."

Lewis Carroll, *Alice in Wonderland*

Developing and executing your marketing plan will move you from point A to point B. Self-assessment is about point A, where you are and what you are now. Point A includes current services and financial conditions. It includes your plans also. Where do you think you are going and who will pay to get you there and keep you there? Point B is, of course, that destination at which you are now aiming, with vigorous services and grateful customers. Our guess is your objectives will change as you develop this new marketing plan. What is *now* your point B will move, reflecting your new objectives. Do not assume you know where it is headed.

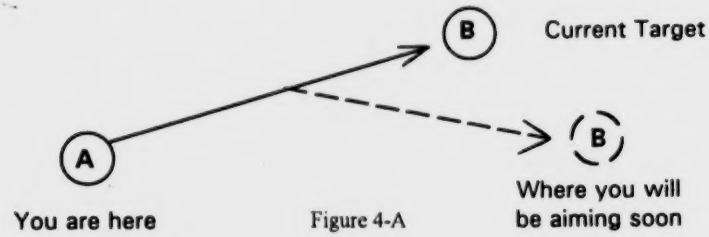


Figure 4-A

UNDERSTANDING YOUR FINANCES

The financial health of your organization will determine to a great extent where point B is and how quickly you can move in its direction. The various categories of libraries enjoy different types and levels of support. Public libraries rely on local levies and state monies, which can provide somewhat stable income over the years. Corporate and government libraries can appear and disappear based on short-term budget changes.

Financial Goals

You must examine your own financial support in relation to what you want to accomplish. Understanding how much is being spent for marketing now, as a percent of your total budget, will influence the action plan you construct. Calculating that number can be difficult, because many library

accounting codes include hidden expenditures for marketing. Later chapters deal with specific types of libraries (e.g. corporate, government, and medical), each of which has a different spending pattern. When you are part of a larger organization, it will be necessary to gather expense numbers for the library and for information research functions being conducted by other departments.

Marketing as a Percent of Total Spending

Now look at Exhibit 4-A to see how a public library in Ohio, using the standard accounting codes, can produce an estimate of total funds spent on marketing. Note that the sample calculation on Exhibit 4-A1 shows that the director spent 25% of total time on marketing and total marketing effort was 10% of all general fund operating expenditures. These are based on one library's results and are in no way a standard for Ohio libraries.

Whatever the result of the calculation for your library, the percent of total expenditures devoted to marketing is probably too low.

From what librarians say these days, it is easy to conclude that a large proportion believe libraries are spending too little on real marketing. Therefore, after you make your own calculation on Exhibit 4-A it might be well to consciously plan a move of a few percentage points toward putting a larger proportion of available funds into marketing. Or at the very least, some resource might be diverted from public relations into the more investigative levels of marketing.

RATING YOUR SERVICES

The major objective of the self-assessment is to define services you currently provide, and those within reach, as well as to assign some level of competence to each. That means YOU judge how well you perform, as opposed to how you THINK your customers rate you.

Several approaches can be used depending on the size of your library's organization. A small library may rely on staff discussions, while larger libraries will probably use questionnaires or forms to gather and compile the opinions of more diverse groups and departments.

Exhibit 4-B is a sample self-evaluation form for a public library. Exhibit 4-C is a sample form for a corporate Information Center. Your list of services may be very different from either example. Your initial breakdown of services should be complete without excessive subdividing of categories. Remember, this is just a starting point. There will be many chances to refine your thinking down the road.

How often should a library conduct a self-assessment? In later chapters, you will read about the process of the continuous improvement of everything your library does. Once embraced, that idea leads to on-going self-assessment, and on-going enhancements in services you provide. But even with that continuous approach, every organization can benefit from a periodic review, perhaps semiannual or annual, a self-analysis of how you rate your current performance.

Statistical Measures

Another objective of self-assessment which may help in later steps is the gathering of library usage measurements that can be quantified. For instance, all types of libraries in Ohio report annual output statistics (measurements) to the State Library of Ohio, which provide standard comparisons between libraries. Some of these may be more accurate (e.g. size of collection), while others may be difficult to measure in either number or effectiveness (e.g. customers' research questions answered by your staff).

Still others may be affected by nonstandard factors (e.g. reducing the circulation period may increase circulation; renewals may or may not add to that measurement). Chapter 16, "Public Libraries," and Exhibit 4-D deal further with available statistical measures.

Do not stop with the traditional measurements. With today's library computer systems, you may have access to many other statistics that relate to your marketplace. For instance, a public library may want to know the percentage of card holders who live outside the geography served, or how many card holders have not checked out material in the past 24 months. Circulation figures for specialized periodicals may quickly identify high cost, low usage titles that could be discontinued. The accessibility of this type of information will depend on the software installed on your computer, and on the willingness of the software producer to enhance the product's functional capabilities.

List everything you have always wanted to know and discuss that list with your automation specialist, data processing department or even the software provider. If what you want is not available today, you may, at least, instigate computer system changes that will make more information available in the future. Remember that in this case you are the customer. The hardware and software vendors should be responding to your needs.

Measuring Quality

Another approach to self-assessment focuses on quality. Exhibit 4-E is a questionnaire to elicit feedback on a library staff's positive and negative reactions to quality issues. Suggestions for improving service and quality will be good input to the Product Planning activity. The questionnaire will provide a measurement of staff understanding of what quality means and their overall rating of the library. Some measurement, however crude, of staff morale may be derived from their responses. If morale problems surface in this manner, they can be addressed during the planning process. Positive morale can be reinforced at the same time.

No matter what method you use to make a self-assessment, the results should be reported back to those who participated, and preferably to the entire staff. In the long run, the library staff must "buy into" your marketing program for it to succeed. Early feedback may raise morale and enhance your chances for success later on.

Depending on the array of services your library decides to provide (and to market), measurement of customer satisfaction may require frequent sampling of public opinion. How frequently sampling should be done will depend on how fast your customers' needs change and how rapidly you change the services you offer. Feedback from your customers can be gathered whenever you interact with them, but any formal survey should elicit their opinions on both currently-offered and potential services. More about this when we get to product planning in Chapter 6.

PHYSICAL PLANT & EQUIPMENT

Evaluating your financial position and the services offered will, in all probability, lead to an assessment of the space you occupy and the equipment being used. When planning and implementing new products and services, a library's physical environment will influence what can and cannot be accomplished. Implementing a new technology, like CD-ROM, or expanding a collection may require more floor space that you have available.

Condition of the library's physical plant may have to be addressed, and the correction of problems may help improve overall service. Every aspect, including access for all customers, can have a bearing on how your marketing plan develops.

REPORTING STRUCTURE

Successful implementation of a marketing plan will almost certainly require management support. Because library mission and priorities may be redefined in the process, having backing from the highest level possible will help the library weather any controversy that arises.

For public libraries, management support implies the Director and the Board of Trustees. For other categories of libraries (government, corporate, academic and other special), the reporting structure will vary, but will be important. To be successful as information resource centers, libraries must report to a manager or executive who believes in the inherent value of providing better information to the total organization.

In preparing this handbook, libraries were found to be reporting to Chief Financial Officers, Directors of Research, the Investment Division of a bank, and a Building Manager. None of these is automatically good or bad. If the controlling manager understands the importance of information to the attainment of the organization's goals and objectives, the library has better odds of succeeding. If the library has been dropped in that manager's lap because "*someone* had to take it," a marketing program and even the library's existence may never have a chance.

Knowing where your organization's strengths lie today will be important when planning for future services. Therefore, this self-assessment should not be taken lightly. You will want to take advantage of your strengths. Equally important, you must identify your weaknesses and be prepared to bolster them by expending resources at the right time.

Summary: Self-Assessment

* Determine where you are now before moving toward your target.

* Evaluate your strengths and weaknesses in:

  - finances
  - service delivery
  - statistical measurements
  - quality
  - physical plant
  - reporting structure

* Be prepared to take advantage of your strengths and to remedy your weaknesses.

CHAPTER 5
MARKET DEFINITION

Defining the audience to be served should not become simply an intuitive act. Depending on the type of library, different factors will come into play. For public libraries, geography may be the defining factor. A medical library may wish to restrict or enlarge the population served, and a corporate library may provide service to a select group within the company.

IS YOUR MISSION CLEAR?

It seems reasonable to expect that the market to be served will be defined in a library's mission statement. If none exists, or if the stated mission is out of date, a new or updated statement should be developed. Clearly, defining a target customer set at odds with your library's mission will only cause problems down the road.

What makes this market definition so important is that surveying customers to determine their needs (to be done during Product Planning) implies a knowledge of who they are.

MARKET SEGMENTATION

Every library has an overall market made up of many segments. Market segmentation, the process of dividing customers into groups with unique characteristics and needs, is a universal requirement and therefore it is covered in most marketing texts. It means quite simply that all those you serve can be divided into categories, each of which may require different kinds of service with varying quantities of support. The same overall population can be separated by age, location, profession, department, technical competence, and any other characteristic that may help define service requirements. Market segmentation, while it can be defined easily, can lead to complex, interrelated groups of customers. Each library must decide which dimensions are the most significant or be faced with an indecipherable array of needs. At the other end of the spectrum, some niche markets are defined by a single dimension.

In the bibliography at the back of this book there are several useful items on segmentation including books by Joseph Grunenwald and Elizabeth Wood (with V.L. Young). Michael Weiss's *The Clustering of America* is a classic on market segmentation. It is entertainment in part but instructive in showing just how different yet definable we all are. One set of audio tapes entitled "All Things to All People? Forget It!" is a forceful examination of market segments.

Include All Customers?

The process of segmentation must begin by being inclusive rather than exclusive. There will be many opportunities to exclude groups from your customer community as a marketing plan evolves. Identification of subgroups within the total customer set will permit analysis of specific needs

and possible solutions versus available resources. Compatibility of groups must also be considered. Introducing the general public into a professional library may make it less attractive to its core group of professionals. Different segments may not be compatible and so may have to be served in different ways.

New Segments for Growth

Libraries have been reaching out more to potential customers. Interestingly, many businesses are now recognizing that their future growth will depend not on current customers, but on those who have not yet become their customers. Likewise, libraries should be prepared to widen their potential customer base.

Example: Medical Library Segmentation

As an example, consider a medical library connected to a university, its medical school and hospital. The constituencies that might be included are:

- medical school faculty
- hospital medical staff, including visiting physicians
- nursing staff
- health care professionals
- medical school students
- university faculty and students
- physicians - within the near vicinity
  - within a wider geography - state/region/nation
- medical staff at other hospitals
- faculties and students at other universities
- law firms
- corporate medical staffs
- general public

The library could support a variety of information functions:

- medical research
- faculty/student education
- physician information center
- access point to medical data bases
- general reference

Other resources may be available to the potential customers:

- other libraries - some more, some less capable, general or specialized, with varied accessibility and costs,

- remote access to information resources/data bases; possible from almost any PC, anywhere.

Access to alternate sources may, however, be limited by distance, high usage charges or the user's lack of technical expertise.

The library's governing body may require the inclusion or exclusion of specific groups (e.g., other medical schools, or a priority scheme favoring one group over another). There may be a strong commitment to building medical information networks. Alternate sources of services may be readily available or they may be nonexistent. Limited income may quickly define the audience who can be served.

Assigning Priorities

Weighing all of these factors, our example library may prioritize potential customers in several ways. Based on their "right" to use this facility the hierarchy of users may look like this:

Medical school students Medical school faculty Research professionals	High priority
Nursing staff Hospital medical staff Health care professionals	
University faculty/students Other local physicians/hospitals Corporate medical staffs Lawyers	
Other universities General public	Low priority

Medical libraries would, of course, have significant differences in their priorities depending on their affiliations. This example would be more representative of a medical school library than a hospital medical library.

Why is this ranking so important? Because the information industry continues to expand in both available products and desired services. This points to the next element, product planning, which includes determining what customers want and it will almost certainly produce more wants than resources available to satisfy them. If customers are not well defined and ranked, it will be difficult to decide on a set of prioritized services that provides the most valuable function for customers. While priorities may change over time, remember that marketing is a continuous activity, and you will be adjusting priorities to match new demographics or organizations.

All libraries must prioritize customers. Even public libraries, which may in theory serve all of their constituents equally, will find it difficult to do so in practice. Limited resources force hard decisions, and one exercise for a public library might be to list how each additional increment of revenue, say $25,000, would be spent if it *had* to be used to serve one customer segment, e.g. children, elderly, businesses, adults, or students. With no equivocating in the process, a true ranking could emerge.

There will be libraries whose mission is reduced or whose customer set is diminished. Ranking customer classes is as important for those organizations as it is for the growing library that has to decide what additional services should be developed.

GAIN AGREEMENT

Before moving on to Chapter 6, "Product Planning", it would be wise to get concurrence and support for your definition of your market. Whether that includes a single "management" person, a focus group of customers, the library staff, or all of them, will depend on your particular organization. Having all your supporters in the boat with you is important, even if you alone are pulling the oars.

Market definition, which may have seemed trivial, is an essential building block in the foundation of a viable marketing program. Failure to accurately identify customer groups and to assign proper priorities will, over time, severely impact a library's chances for success.

Summary: Market Definition

* Determine who you serve and the importance of each category of customer.
  - Does your mission statement specify your constituents?
  - Include all potential customer groups.
  - Prioritize all groups. Whose needs are most important right now?
  - Agree on customers and priorities now, before you have to make resource allocation decisions.

CHAPTER 6
PRODUCT PLANNING

> "Would you tell me, please, which way I ought to go from here?" [asked Alice].
>
> "That depends a good deal on where you want to get to," said the Cat.
>
> "I don't much care where _____" said Alice.
>
> "Then it doesn't matter which way you go," said the Cat.
>
> "_____so long as I get *somewhere*," Alice added as an explanation.
>
> "Oh, you're sure to do that," said the Cat, "if you only walk long enough."
>
> Lewis Carroll, *Alice in Wonderland*

The completion of the self-assessment and market definition phases should position your library for the next element of your marketing program: Product Planning. The self-assessment defined the library's strengths and weaknesses in providing both current services and potential new ones. The market definition listed and prioritized all of the possible customer groups to be served.

Product planning will now consist of several parts:

- determining what customers actually want and need
- defining solutions that match resources with those needs
- creating a plan to provide the required services
- distributing your plan.

DETERMINING CUSTOMER NEEDS

There is nothing more critical to a successful marketing program than determining exactly what services customers want, how valuable those services are to customers, and what customers' priorities are. Every other part of marketing may be done correctly, but if you end up providing the wrong services, there is no reason to expect that your customers will stay with you. There are alternative sources of information for almost everyone.

Customers of nonpublic libraries will have a much narrower range of information requirements, which they will expect their specialized library to satisfy. But they will also want more information, and want it faster. Public libraries must offer wide-ranging services to satisfy a variety of community needs. The methods used to determine customer requirements must match the audience and the defined mission of the library.

The most popular methods used to determine individual requirements are customer surveys, focus groups and interviews. They address the basic need for contacting customers to determine what they know now about current and potential library functions, what services they think they need and what value those library services will have, making their lives and jobs more productive and enjoyable.

In Figure 6-A, characteristics of each of these methods are briefly outlined. The best approach for your library will depend on your mission (stated or implied), size of the customer groups you serve, the library's relationship to those groups (internal, e.g. corporate information center; vendor, e.g. online data base supplier; multiple customer sets, e.g. public library). A combination of techniques may be appropriate if you must begin with a more general survey, then focus in on high priority select group of customers.

In addition to this discussion, more information can be found in Appendix B, "Surveys to Gather Marketing Information" and in Exhibit 6-A, "Focus Groups." Numerous examples of surveys are included in Appendix B, with the results, strengths and weaknesses of several reviewed. Exhibit 6-A describes how to organize and conduct focus groups.

Two types of surveys to consider are telephone and written. The most appropriate form will depend on the quantity of information to be gathered and the expertise required of the surveyor. You must match the level of detail required to evaluate your customers' needs with the approach each type of survey dictates.

Telephone Survey

In general, a telephone survey can address the broad spectrum of customers and the varied services of a public library. Questions are not designed to elicit open-ended responses, which would be difficult to summarize. Multiple choice or fill-in-the-blank answers can be tabulated more easily. Since a large number of people will probably be interviewed, complexity must be avoided.

But do not assume that the public will be satisfied with only low level services. A survey should attempt to measure the need for advanced information services and the readiness of customers to use them. Libraries must be willing to lead the way by implementing new services and introducing them to customers even before those customers can fully articulate their needs.

An example of a telephone survey conducted for a public library (Exhibit 6-B) illustrates the breadth of questions that can be asked in a relatively short time period. The information to be garnered from this type of survey includes demographics, customer opinions of current services, and needed new or enhanced services. The advantage of this kind of survey is that questions can be stated simply and results tabulated without complex analysis. Surveyors need not know much about libraries or the customers being interviewed. The disadvantage is that depth of information about the customer set cannot be achieved, but most public libraries must concentrate more on breadth of service than on depth.

Written Survey

The written survey is effective when everyone being surveyed is within the same organization. One example of a corporate survey (Exhibit 6-C), combined multiple choice with some open-ended questions; it was distributed across departmental and functional boundaries. This type of survey can help differentiate classes of service requirements, whether unique to

Characteristics of Survey Types

	Target	*Objectives*	*Questioning Techniques*	*Required Facilitator Skill*	*Advantages/ Disadvantages*
Interviews	Customers with specific detailed needs: Executives, Research/Engineering Marketing, Attorneys, Physicians	Define specific needs. Relate services to business objectives. Determine value of information to individual and organization. Establish support for library.	Broad, open-ended. Probe for job content and requirement. Question for actual or perceived value of information.	Knowledge of organization structure and function. Ability to structure open-ended questions, clarify and restate responses.	Flexibility; responses can be clarified; questions bypassed when inappropriate. Ability to obtain more information than written or telephone survey. Collection of longer or shorter responses. Cost of using trained interviewers. Bias of interviewers.
Telephone Survey	Community: Large multi-faceted. Enough respondents for statistical accuracy.	Identify broad range of information. Correlate needs to subgroups of customers.	Simple questions. Multiple choice or fill-in-the-blanks. Suggested services rather than asking for random ideas.	Pleasant. Good communications. Little knowledge of subject needed.	Low cost. Less time to complete interview and compile results. Limited amount and detail of information collected. Available telephone listings not representative of population.
Written Survey	Agencies. Small/medium sized business. Faculty and/or community. Enough coverage to be representative, thus results accepted by all as accurate.	Differentiate needs by department, occupation, level in hierarchy. Identify information needs beyond standard library offerings. Widespread acceptance of resulting library actions.	Multiple choices and fill-in. Open-ended questions to broaden range of needs and potential solutions. Questions aimed at identified specific subgroups.	Understanding of organization's goals and objectives. Analysis of open-ended responses. Correlation of responses to organization goals.	Low cost (only postage - no people costs). Anonymity. More carefully formulated responses. No interviewer bias. Lack of response. Misunderstanding of questions.
Focus Group	Representative group of constituents (staff and/or customers). Recruited for specific topics.	Preliminary look at service issues. Define need for additional surveys. Determine direction for further product development and marketing.	Open discussion with lead from moderator. Well designed questions to elicit needs, perceptions, reaction to different product solutions.	Establish rapport with group. Flexibility. Control group dynamics.	Efficient; interacting with several people at a time. More people provide greater stimulus for reaction. Persons selected may not be typical of the group they are presumed to represent.

Figure 6-A

one group or common to all. There may be specific information requirements in a particular department, that can be explained and cost justified in a brief written response. If follow up discussion will help to clarify or expand on a survey answer, time and energy can be spent on those customers who specifically articulated their needs.

Another corporate survey (Exhibit 6-D) was designed so that responses could be differentiated by job category. Customer needs may vary between departments, but an even greater divergence may be found when the responses of executives, middle managers and employees (e.g. salesmen, engineers, technicians) are compared. The library's objective should be to satisfy the requirements of customers at all levels in an organization but not necessarily in the same way. That may mean spending more time with those at the top, determining what information would most enhance their decision making. Those decisions are often pivotal for the organization. Support for the library will be enhanced if executives are made aware of the valuable information services their library can provide to the entire organization.

Solving the information needs of the nonexecutives, who constitute the majority of the organization, can significantly impact effectiveness and productivity. Making a dozen, a hundred or a thousand people more productive with better information can be as valuable as investing in plant and equipment. Clearly, then, the viability of a library should not depend solely on how much executives use it, any more than the maintenance of factory equipment should be governed by an executive's personal need for those maintenance services. There are, unfortunately, examples of library functions curtailed or eliminated because those responsible for approving expenditures saw no personal benefit from the library and because no one articulated the value of the library for the entire organization.

Focus Groups

The use of small discussion groups, called focus groups, is popular with many types of organizations, including libraries. The objective of a focus group is to elicit group discussion of products, services or marketing issues, through questions crafted by the moderator and client.

The focus group moderator can narrow or broaden the discussion to obtain both reasoned and emotional responses to questions. Emphasis is always on group interaction since that method is best able to generate the maximum information. For more on focus groups, see Exhibit 6-A.

Interviews

The interview technique is most appropriate when the customer requires very specialized information which cannot be defined in general terms; it also implies the interviewer has enough knowledge of the customer's job or function to conduct a comprehensive interactive interview. Often a library directly affects how well a person, department or division can meet an organization's objectives. The more integrated the library is with a single functional area, the less effective telephone and written surveys will be. Direct interactive discussions become the vehicle for defining detailed business needs.

In-depth analysis of the information needs of very specialized groups (e.g. research laboratories), will probably require customized interviewing. In fact, this category of library almost certainly requires an ongoing close working relationship with its customers. The library staff must have a higher level of understanding of the organization's objectives and of how information needs can be satisfied.

Preparing the Survey

Designing an effective survey is clearly an important part of a marketing program. In addition to the examples of surveys included in Appendix B, the bibliography includes publications that provide guidance in survey preparation. *Marketing Research*, 2nd edition, by Ronald M. Weiers is an especially good source on survey design and includes several sample questionnaires.

Any good text will also discuss the problems connected with surveys which include:

- uninformed respondents
- insincere answers
- misunderstood questions
- poor sample selection
- stonewalling by potential respondents.

Developing a survey of any form is not a simple task. Library staffs may not have experience in formulating questions, and wording of questions to elicit the best responses possible is important. For telephone surveys the categories of responses offered to the customer must allow for easy statistical analysis of the survey results. As mentioned previously, the distribution of responses to multiple choice questions can be rapidly compiled. That does not mean that designing the question and the possible answers is trivial. A single question may not easily measure customer satisfaction with a particular service. Many factors may affect satisfaction, including the quality of the information provided, the time required to find that information, and the staff expertise applied to the search process. When there is a need to differentiate the effects of multiple factors, multiple questions will be required.

These requirements may suggest the use of an outside consultant or market research firm to construct, conduct and compile the results of your survey. The cost of expert help may be well worth the quality it can add. Some Ohio libraries have found low-cost and effective help available through colleges and universities. The State Library of Ohio can assist in locating consultants who serve libraries' needs across a range of functions.

Before conducting any survey, a pilot test of the material should be completed. Feedback from a small group of subjects can be used to modify unclear questions, to alter tabulation methods, or reduce redundancies.

Return Rates

One often-asked question about surveys concerns the return, or response, rate necessary to obtain statistically valid results. While we will not address the mathematics of this problem here, several of the books listed in the bibliography will help resolve the issue. From the do-it-yourself approach of Breen and Blankenship to the full-blown market research text of Ronald Weiers, each library can choose the degree of statistical complexity desired.

Regardless of the mathematically correct sample size, you may be pressured to achieve a higher percent of participation. For instance, within a smaller organization, where consensus decision making can be more important than statistical elegance, a survey may become a ballot, with participation strongly urged or edicted. That does not happen with a large external customer set, where the costs of preparing and mailing surveys and compiling results usually outweigh the desire for completeness.

Having determined the requisite number of completed surveys and having estimated a return rate, the quantity to be mailed or otherwise dispersed is easily calculated. However, ensuring you actually receive enough responses to meet your targeted return rate requires planning and execution. A telephone survey that uses numbers picked at random, can reach a valid sample by simply calling until the required number of people answer their telephones. A written survey will necessitate more "selling" to achieve the sample objective.

How then can you affect the return rate? When Janet Bix, director of the National Ground Water Information Center (NGWIC) in Dublin, Ohio, wanted to survey her existing customers, who pay to use the NGWIC online data base, she adopted a strategy to increase the probability that each customer would respond. Persistence was an important factor. Customers received a postcard announcing the imminent arrival of the survey, which was mailed right on schedule. Another reminder postcard followed, urging customers to complete the survey. Return postage was prepaid. Rewarding participation with a small credit toward their data base access charges, Bix gave customers added incentive to complete the survey. Customers had to choose between returning an anonymous survey and identifying themselves to claim the credit.

If customers are convinced they can benefit from filling out a survey they are more likely to participate. Potential benefits may include improved quality of information, faster access or lower costs.

DEFINING SOLUTIONS

Your completed customer survey should let you produce prioritized needs, as defined by those customers. During the Market Definition phase, a different priority was defined, which indicated whose needs were most important to the library. Now those two priority lists, perhaps conflicting, must be combined, along with the range of services which the library can support. The result will be the basis of the service plan to be executed in a time frame that has predictable resources, technology and management support. A ten year plan to spend money that is nonexistent or uncommitted, or to use technology that has not been invented, will have little chance of being approved.

Do not expect potential services to line up neatly as a result of this process. Instead of a single list of services in priority sequence, expect a matrix with priorities varying within and among groups of customers. Another dimension may be the costs of implementation and on-going operation, or the time required to design and implement each service. Organizational politics may add another critical factor. All of this leads to a complex dilemma.

There is no simple answer to this dilemma. Unless your customers have no interest in new and improved library services, you will not have enough resources to meet their needs. But if you have been thorough in your self-assessment, market definition and customer survey, deciding what to supply and where and when to supply it will become a more logical process.

Available and planned technology will, in all likelihood, be a key factor in planning services. Even if great advances may be on the horizon in a particular technical area, present customer demands may dictate the implementation of a new service using current technology. You must decide whether the cost can be recovered through customer use before the solution becomes outmoded and obsolete.

Gather as much information as possible on current products, both hardware and software, and those advances expected near term. Be aggressive in pursuing the best new solutions for your customers, as urged in Appendix A, "Influence of Technology on Library Service." While it would be foolish to plunge ahead with unproven and expensive technology, if you wait for mature products before proceeding, you may find the market has left you far behind.

Sources of information include vendors, library and information systems periodicals, professional conferences and contact with other libraries. Do not limit your contacts to libraries like yours. Public libraries can learn a lot from corporate libraries, where new technology may be tried sooner; corporate libraries may find services available from public libraries, either free or for a fee, that could enhance their customer service.

Through all of this planning, as you define what you want to create and its eventual cost to customers, remember this:

- the best information, made instantly available, is unattractive when the price exceeds its value,
- incomplete or inaccurate information, difficult to access and slow to come by, is unattractive even when free.

CREATING A PLAN

The final step in producing a plan is to add realistic cost and time estimates. A detailed plan with objectives and deadlines clearly stated and committed to, will set expectations for management and for those who will execute the plan. Without that detail, it will be more difficult to track progress and to spot problems.

Obtaining agreement from management and from a representative group of your customers is the final step before starting to work on new services. With concurrence, from inside and outside your organization, you will be addressing the real needs of your customers, and the periodic reviews you need to conduct will have firm objectives against which to compare progress.

An example of a library marketing plan can be found in Exhibit 1-A. That particular plan was created for a medium-sized law firm, but much of it can be applied with modification to other types of libraries.

DISTRIBUTING YOUR PLAN

Telling the world what you plan to do is similar to the Selling phase of this marketing process, but is included here because ongoing support is important. Without communication with customers and within your organization, it will be difficult to sustain that support. Tell everyone what you plan to provide, and during the next phase, Chapter 7, "Product Creation," distribute updates at regular intervals.

Summary: Product Planning

* The most critical element of marketing

  - determine what services your customers require and how you plan to provide them

* Use of surveys, focus groups and interviews - a combination of techniques can be utilized to define customer needs:

  - telephone surveys
  - written surveys
  - focus groups
  - interviews

* Knowing what your customers want and whose priorities are most important to you, develop your plan to provide solutions, both quick and easy, and long and difficult.

* Gain agreement and commitment to your plan from staff, management and, if possible, customers.

CHAPTER 7
PRODUCT CREATION

With a product plan completed, published, and supported by staff and customers, the library must now produce the services called for in that plan. Libraries have historically expended more effort on improving existing or creating new services than they have on marketing. But there are several areas that should be considered by even the most experienced library staffs:

- emphasis on quality and value
- project management as a necessary tool
- flexibility necessary for any plan
- the need for informing customers and management of progress.

QUALITY & VALUE

Organizations of all kinds are concerned today with the issue of quality. Libraries are certainly included in this movement to improve everything we do. The objective is simple: to continually examine what is done and make each process more efficient and effective. Two suggestions which can help to accomplish that objective during this product creation phase are:

- **Focus on productivity.** How can the new and improved services you are creating help both your staff and your customers do their jobs better, expending less time and effort, or producing better results.

- **Improve competitiveness.** Add value to services you buy, like data base access, and to services you build yourself. That added value may be additional functions or expert staff assistance. You are competing with other information sources. Your customers are also in competitive situations; your services should attempt to make them better able to compete. This may not fit your image of what libraries are supposed to do, but all libraries, including public, been facing increased competition for some time. Do not expect this to change in the near future. Who constitutes the competition? A partial list would include: information services vendors, bookstores, publishers, market research firms, information research services, and media organizations.

PROJECT MANAGEMENT

Product requirements that result from the marketing process will vary significantly in terms of resources needed to create and support them, time frames for completion, and their value to customers. Unless your plan is trivial, organizing and managing the creation of new services can become complex. Proven project management techniques are essential. Many libraries have not seen project management as a necessary skill in the past, but it must be so for the future.

Project management will help you in three areas:

- defining tasks to be accomplished, their interdependencies, and the resulting plan of attack,
- developing a detailed schedule based on time requirements of each task and resource conflicts,
- tracking, controlling and reporting progress of the project.

Each of these can be complex in itself, and the methods used for managing a project can simplify or complicate the situation. Tools such as PERT (Program Evaluation and Review Technique) and CPM (Critical Path Method) charts are used almost universally to visually capture and describe task interdependencies. Bar and Gantt charts provide two different visual approaches to scheduling. Figure 7-A (CPM chart) and Figure 7-B (Bar chart) illustrate how these two techniques, representing the same project, are used together to plan and monitor progress.

Although Figures 7-A and 7-B represent the same project, they are used for different purposes. A critical path diagram illustrates the dependencies between tasks and the resources necessary to complete each task. Resources are typically assumed to be staff workdays but could include any finite resource essential to the project, e.g. a personal computer whose use must be scheduled by multiple people.

When task dependencies are charted as in Figure 7-A, the sequence of tasks requiring the longest time to complete is the critical path. In the example, task C cannot begin until task B_1 is completed. Task F cannot begin until both tasks B_2 and E_1 are finished. The critical path is found to be tasks B_1, B_2, and F, which totals seventy-nine days, the shortest possible elapsed time for the entire project.

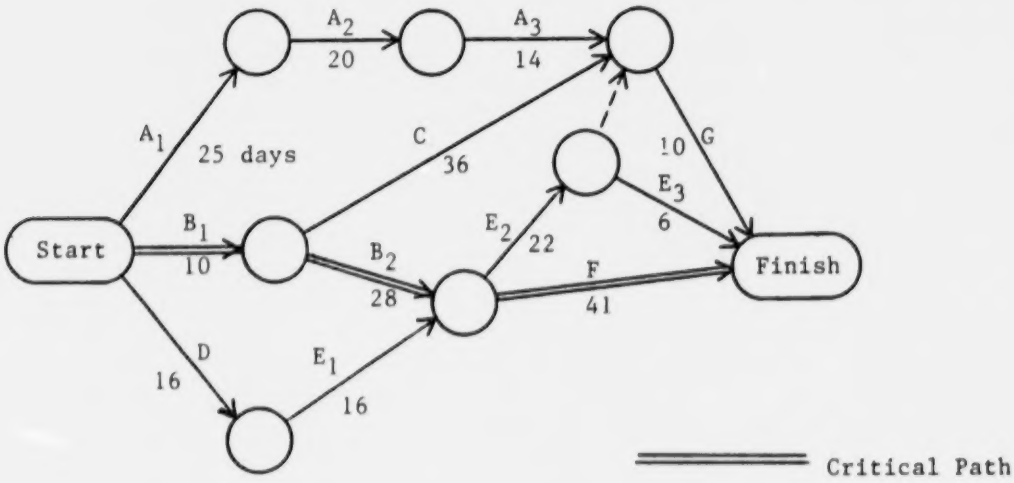
The bar chart in Figure 7-B illustrates one possible schedule for the project. Many of the tasks could move forward or backward in time without affecting the project completion date. The chart can graphically illustrate resource conflicts that were mistakenly omitted in the critical path chart. If for example, tasks B_2 and C are to be executed concurrently but both require the same person working full-time, they clearly cannot occur as shown in the bar chart. Either they must be shown as sequential tasks, i.e. C dependent on the completion of B_2, or the time required for each must increase to account for the shared resource. The third alternative, of course, would involve assignment of another person to one of the tasks.

It should be clear that in the life of a project, some tasks take a longer, or shorter, time than expected, which can alter the remainder of the schedule. Network and bar charts, therefore, are not static, but can change frequently before a project is completed. As progress is made or plans and objectives change, updating these charts will quickly reflect those changes, making the reporting of project status and expected completion dates less burdensome.

No one has the ultimate project management system, but there are many that can be effectively used. Whether a manual or automated system approach is chosen, take the time to educate those staff members who will be responsible for tracking progress, making decisions on deployment of resources, and periodically reporting on progress. Whether you use an automated project management system or a manual version, keep it up to date with tasks completed and milestones reached. It will thus be ready at any time for review and modification.

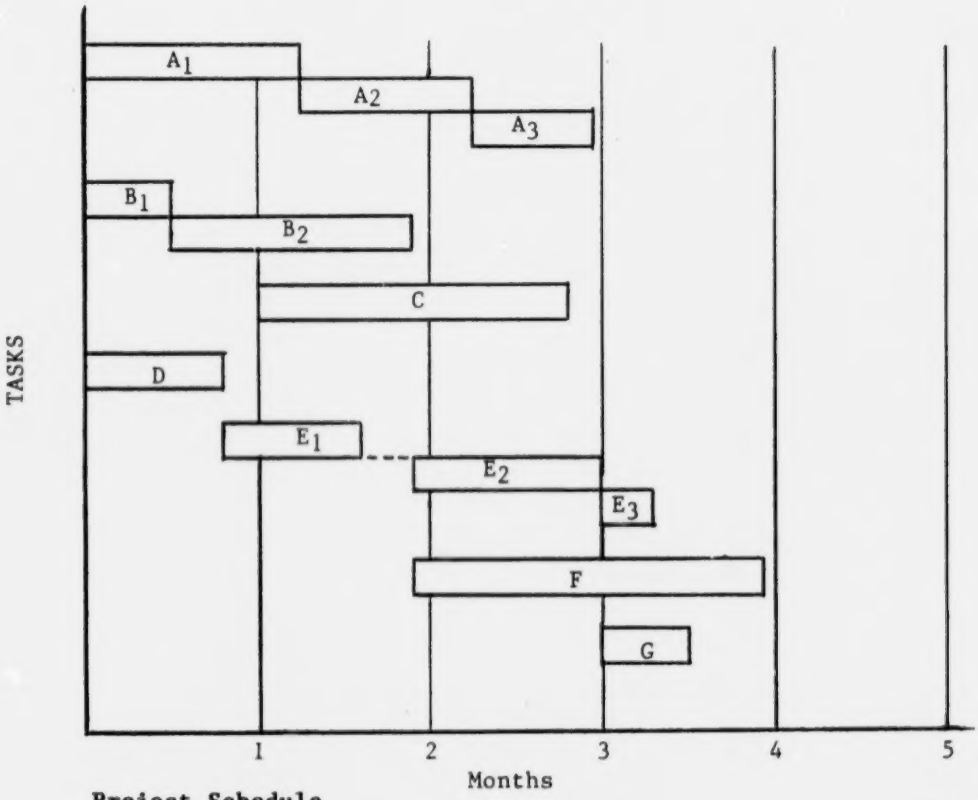
The sources on project management listed in the bibliography can help you get started. Timothy Douglas's book contains a set of sample forms for developing a manual system. The book by Milton D. Rosenau, Jr. describes a step-by-step approach for organizing and executing a project.

PROJECT MANAGEMENT SCHEDULING TOOLS: CPM NETWORK AND BAR CHART



CPM Task Network

Figure 7-A



Project Schedule

Figure 7-B

Ira Krakow's book addresses how to use many of the popular PC software packages for project management. Since software improvements constantly appear, it is difficult for a book like Krakow's to be totally up to date.

The choice of system will depend on the functions you need and the cost of hardware and software. Typically, software packages will cost somewhere between $200.00 and $500.00. Some run in a DOS environment, requiring fairly standard configurations. Others, which run under WINDOWS, will need additional hardware resources.

Several commonly used project management software packages currently on the market are listed below. No specific prices are shown; the market prices for software are far too changeable. No matter what numbers were included here, they would be inaccurate before the handbook could be printed.

DOS:	Harvard Project Manager 3.0, from SPC Time Line, from SYMANTEC
WINDOWS:	Microsoft Project for Windows, from Microsoft ON TARGET, from SYMANTEC

FLEXIBILITY

"It is a bad plan that admits to no modification."
Publilius Syrus, *Moral Sayings*

Everyone will agree that following the plan you developed is the key to success; however, being oblivious to changes in the environment, whether originating with your customers or internally, could cause you to create a product or service which misses the mark. That mark may have moved while you were en route to it.

Modifications may be needed along the way. New technology may become available. There may be changes in your organization's objectives, or a change in the customer base you serve. Therefore, you must be prepared to alter course if necessary, but do not assume it means every new idea will sway you from your plan.

PERIODIC REVIEWS

As a by-product of a good project management system, progress can be tracked more closely. During this phase of producing the services your customers want, you should conduct regular, scheduled reviews with management and customers. Customers in this instance may be a representative group assembled from the community, research lab, faculty or marketing department, depending on whom you are serving. If you are executing well against the plan's objectives, everyone should know that. You want their continuing support. If you are behind, for whatever reason, you want to keep their support.

While all of this project management and these periodic reviews are occurring, there is one other point to remember. No one likes to wait forever to reap the benefits of new products and services. Even if your plan is complete and includes all of the reviews it should, tangible, intermediate results can be crucial to your long term success.

For that reason, your plan should include milestones at which real, usable services will be available for your customers. They will accomplish several things. Customers and management will have visible evidence that your plan is creating something, and problems can be corrected in flight, rather than waiting for the entire service to be completed. The earlier problems are diagnosed and fixed, the less costly the project will be.

Summary: Product Creation

* Building new or enhanced services will produce superior results if you ensure proper resources are applied to the task.

* Concentrate on:

  - the quality of the results and the value they will have for your customers

  - the use of solid project management techniques to get the most out of your investment

  - reviewing progress often and having the flexibility to change direction when needed

  - keeping customers and management aware of and excited about your progress.

CHAPTER 8
SELLING

"When you sell a man a book you don't sell him just twelve ounces of paper and ink and glue — you sell him a whole new life."

Christopher Morley, *Parnassus on Wheels*

Of all the elements of a marketing program, selling is initially perceived by many people as the most obvious and the most important. Now that we have described the first four elements, you may see that each part of marketing is essential. They must all exist in order for the program to survive.

For some libraries, selling has the highest priority, while for others, product creation may be more important. The customer groups to be served and their identified needs should be the factors that determine what should be emphasized.

Earlier in this handbook, we said that marketing is not equivalent to public relations. Clearly, much of what PR staffs do is central to the selling element of marketing, but they will sell more effectively if they are involved in every part of marketing. Effective selling requires not only skillful communication, but also an understanding of the product to be sold, the target customers, and why they need and want this product.

Every library must sell its services. Some may recognize that requirement by establishing a public relations department, often the case with public libraries. Others may serve a smaller customer population, perhaps in the case of a corporate library, and may not even recognize that their daily interactions with customers are part of the marketing process.

Before continuing the discussion of selling as it affects the entire library staff, note that the importance of public relations should not be minimized. Whether a library has an experienced PR group or depends on other staff members to develop flyers and news releases, new and imaginative approaches are constantly needed. Two publications found in the bibliography may be useful, regardless of your type of library: public, medical, special, or otherwise. Kohn and Tepper, in *You Can Do It*, provide practical information to sharpen the skills of both expert and novice. Bussey's article, "Public Relations in Special Libraries," applies PR techniques to any organization faced with selling the value of its information services.

A library that is completely secure and is confident that nothing threatens its existence, might choose to ignore the need for selling. That would be a mistake, because selling is an integral part of providing service to customers.

The selling process we will describe here has several parts, as shown in Figure 8-A. Each function is important, but as with other elements of marketing, each library must decide how to expend resources.

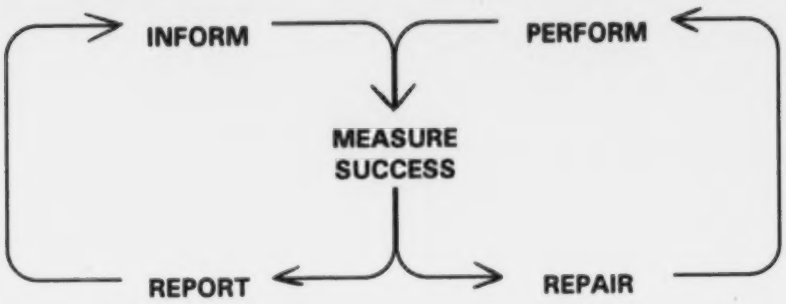


Figure 8-A

INFORM/ PERFORM

There is a link between informing customers of the services offered and performing those services. Doing one without the other will be ineffective. The benefits of regularly telling your customers what is available to them is critical; getting them in the door is the first step.

But the library staff must be prepared to perform when the customers arrive. That means sufficient staffing has been allocated to each service, new or old, being offered, and that training for all appropriate staff members has been completed. Especially in the case of new technology (e.g. CD-ROM or online data bases), customer acceptance will be more likely if the librarian can explain the function and demonstrate its use. Would you want to buy a car from a salesman who said, "Well, I can't drive it, but I understand this model handles nicely?" Of course not. Likewise, customers will not readily accept a new service about which the library staff is not knowledgeable and supportive. Library customers must decide to "buy" the product, and they are sold by three things:

- sales materials — instructions, displays, flyers
- staff assistance and enthusiasm
- product quality.

If Product Design addressed the real customer needs, and if the function provided during Product Creation has value, then informing and performing can lead to customers' acceptance.

MEASURE SUCCESS

Introduction of a new product or service should include the evaluation of the function provided and of customer acceptance. During the product planning and creation phases, criteria for success should be established, along with target dates for meeting those criteria. They might include the number of customers using a new service, the percent of customers requiring assistance, the percent satisfied with the results or, conversely, the lack of complaints.

Setting goals and measuring success will provide feedback needed to correct problems, adjust staff support levels and address customer concerns. The measurement process may be internal, for instance, a staff assessment of their effectiveness or efficiency. It may involve measurement of the learning curve for customers based on staff observation, or it may require written customer surveys to determine their level of satisfaction.

The measurement of success is a continuous process, of course. It should not be thought of as a one-time event. But as each new or improved service is initiated, it deserves a close look to uncover any problems that can be addressed immediately.

REPORT/ REPAIR

The last two tasks to accomplish as part of Selling are the reporting of results and the correction of problems for the new or improved services. The reporting provides timely feedback to customers, staff and management on those services, reinforcing the publicity and training that led to their introduction. The feedback, both positive and negative, can improve ongoing communications with customers, as part of both the Inform and the Perform task.

Repair, as part of the Selling process, includes fixing those problems that can be corrected rapidly. A significant lack of function or information content may require a long-term effort, and leads back to Product Planning and Creation. But those problem items that require little time and resource should be addressed quickly.

Use the results of surveys and internal assessments to determine what problems can be corrected rapidly. Overly vague categorization of problems will not lead to fast action; you must pinpoint procedural or technical errors that can be remedied immediately and attack them vigorously.

Remember that customers, almost universally, are not concerned with how hard *you* have to work to fix a problem. Even when they have unrealistic expectations, trying to satisfy them with fast service and personal commitment will pay off down the road in terms of customer loyalty. Outperform your competition with quality and service and your customers will come back for more.

Summary: Selling

* Selling is more than advertising or public relations. It requires the demonstration of staff knowledge and expertise, and their interest in and concern for the reactions of customers to new services.

* Selling goes on every day, not just the first morning or first week that something new is offered.

* The tasks to be performed in selling are:

  - tell your customers how you can serve them

  - be prepared to perform, with quality, when customers appear at your door

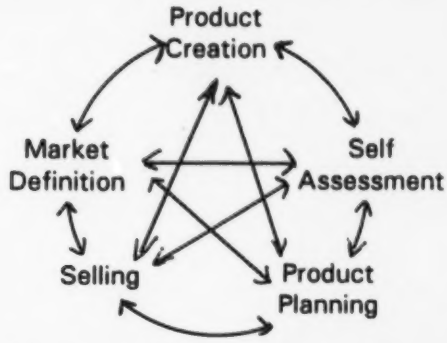
  - evaluate what worked and what was not successful

  - fix the problems quickly, and

  - report those results and improvements, so that customers come back for more.

CHAPTER 9
CLOSING THE LOOP

This final element in the marketing process involves the integration of all of the pieces into a working system. There is no exact sequence of events you must follow. Since the elements we have discussed, self-assessment, market definition, product planning, product creation and selling, all exist and interact continuously, they form a network.



INFORMATION FLOW

The objective is to ensure that information flows freely through that network. Each element provides input to all of the others and receives their feedback. Closing the loop means you must keep each information path open and make certain that feedback is not ignored by customers, management and the library staff.

Closing the loop is not an event, something that occurs after you have assessed, surveyed, designed, built, and sold your new services. The feedback must exist from the beginning, when you first start discussing your own marketing plan. Build it into your marketing processes as they are designed.

Chapter 3, "Developing a Marketing Program," discussed the need for imbedding marketing in every facet of library operation. That is precisely the vehicle for redistributing information, feedback, throughout your organization and out to your customers.

STATUS REVIEWS

To make the entire process work effectively into the future, regularly scheduled reviews should be conducted. They should include participation of staff, customers, and management. The marketing program developed from this handbook, with documented plans and results, can provide a structure for an ongoing review of services and customers' needs.

Frequency of reviews will depend on the size of your library and the pace of change. Whatever the interval, they should be conducted on schedule, with results published (including updated plans).

Fine tuning of your library marketing plan will not be automatic. Conditions will continue to change, and you must be ready to change with them. One thing is certain: waiting for formal reviews to make changes is not an effective way to improve. The following section on Continuous Improvement presents ideas everyone can, and should, follow.

CONTINUOUS IMPROVEMENT

A fundamental principle of the new style of manufacturing is Continuous Improvement. It refers to a process whereby emphasis is put on making many small improvements in quality and productivity rather than waiting for large scale innovations.

Interestingly, Continuous Improvement is viewed not just as a manufacturing philosophy but as a key marketing idea and so it has a place in this handbook. Ford Motor Company, in a manual for the guidance of suppliers (see bibliography), puts quality first as "a means to achieve customer satisfaction." And further, under a statement of mission, the first point is "Our Mission is to improve continually our products and services to meet our customers needs..."

General Motors prepared an inch and a half thick book, "Targets for Excellence" (see bibliography), to instruct its hundreds of suppliers on how to meet requirements for ever-rising levels of quality — at reduced cost. The very first chapter is entitled "Continuous Improvement" and throughout the book they never get very far from that subject.

Though GM and Ford don't bother to mention it, continuous improvement has had a long life in Japanese industry under the name KAIZEN. KAIZEN is a companion to HINSHITSU KANRI - quality control and NEMAWASHI - consensus building. But we will deal here only with continuous improvement which GM describes as a way "to continually identify improvements in the *process* for conducting business." GM's further definition of how-to-do it is:

> "Implementing a Continuous Improvement Process will result in small improvements made in day-to-day operations as a result of group and individual analysis and efforts to improve processes. Innovation usually consists of dramatic improvements in daily routines, often as a result of significant investments in new technology and usually involving only top management and experts. Innovation usually occurs at intermittent intervals. Continuous improvement, however, involves constant elimination of waste in processes and constant improvements in quality and productivity.
>
> The continuous improvement philosophy requires management to be process oriented. The processes must be considered just as important as the end result. This approach means people must be evaluated and recognized not only for the results of their performance, but also for the steps that have been followed (the process) to achieve the results. Management and employees must jointly establish objective process standards for measuring and evaluating improvement."

It is easy to translate these ideas from the automotive world to the library world. Good libraries are never completely satisfied with the results they achieve in quality service and productivity. Everyone must be aware of the need to improve not only the results but also the process that produces those results.

REPRISE

Chapter 4, "Self-Assessment," introduced the first of six elements of marketing with:

> "Where shall I begin, please your Majesty?" he asked.
>
> "Begin at the beginning," the King said, gravely,
> "and go on till you come to the end."
>
> Lewis Carroll, *Alice in Wonderland*

Reaching the "end" of this marketing program, we must acknowledge that there is no such thing as the "end". Marketing continues as an ongoing part of your library's existence, reborn daily with every new customer requirement.

Summary: Closing the Loop

* Integrating all elements of marketing requires lots of feedback and communication.
* Review progress and make necessary changes - better too often than not often enough.
* Get everyone to accept the need for quality and for continuous improvement.
* Never lose sight of the fact that you exist to satisfy your customers, not the other way around.

CHAPTER 10
ACADEMIC LIBRARIES/MEDIA CENTERS

The size of the institution makes a considerable difference in libraries' available information services and librarians' attitudes towards marketing. The largest universities have separate libraries serving major departments. They also have a wide variety of automated information services, including computerized catalogs. Libraries with particularly strong collections tend to have external demand for access to those collections.

Some generalizations relating to marketing which can be made about general academic libraries are:

1. Most of them generate no income. Some view their customers as "captive," so little thought is given to marketing as an appropriate activity for librarians. Only the larger, urban libraries tend to offer information services, for-fee, to the whole community. Some libraries charge a fee for the cost of online time, or other special items.

2. The identities of primary customers are generally known, being students, faculty, and administrators. One librarian said, "Marketing is not a need. Everybody knows we're here. Students have to use us!" This handbook suggests otherwise.

3. For-fee services usually have very detailed information on their customers, although they do not keep records of specific searches, for privacy reasons.

4. The subject area requirements for the library are generally identifiable through contact with the faculty, students, and administrators.

5. Information services available vary widely, but in larger institutions include computerized catalogs, online computer data bases and CD-ROM data disks, and sometimes document delivery. Usually these services are free or are offered at cost to members of the academic community.

Academic librarians are urged to read the chapters in this handbook on school and law libraries especially, since those chapters contain concepts and strategies which apply to many academic libraries as well.

The nature of information services is changing in the libraries with computerized data bases. Just as computer searches supplanted manual ones, now data disks which can be checked out have greatly reduced online computer searches. Data disks are faster and require little librarian time beyond checkout.

Libraries with extensive information services, especially those reaching out to the general as well as to the academic community, appear to have very high demand for their services. They also appear to have a corresponding ability to generate the means to provide increasing services. This is not necessarily accomplished through charges for service.

PREPARING THE MARKETING PROGRAM

Before a library can plan any kind of marketing strategy, it must be quite clear about its role, what it is or what it might be, within the context of the community in which it operates. Does it operate as a separate service function to the main instructional and research processes of the university, or is it an integral part of those processes? Does it want to respond to requests from the community it serves or does it want to reach out to those who could benefit from its offerings? Does it want to increase the use of its materials and services? Does it want to provide for-fee services to external customers? Does it want those services to cover their costs or to generate income for the rest of the library?

Once these questions are answered, the library needs to consider ways of optimally performing its existing role, or of realizing its desired role. In other words, to develop a strategic plan. Marketing, in the broadest sense, will surely play a part. The level and type of marketing will vary according to the roles sought.

Assess Services Currently Provided

Having determined its role, the next step is a formal assessment to rate the quantity and quality of the library's collection or information services. Then comes a formal, pro-active analysis of the collection to see how well it matches the needs of the library's customers. Circulating lists of periodicals and publishers releases and tracking usage and requests provide indirect evidence for such an analysis. Self-assessment tools are shown in Exhibits 4-C, 4-E and 6-C, which could be adapted for academic library use. Exhibit 6-D provides a suggestion for determining users' needs.

Librarians have considerable data on usage of their information systems, as well as of the collection. They have records of online searches and of checkouts of CD-ROM disks. So they know what is being used, and how often. It is more difficult to keep track of who the users are, faculty, student, or administrator, or by department, but it is worth doing. The use of online searches has decreased with increased use of CD-ROM disks, and librarians report that "if a disk or a periodical isn't used, we won't renew the subscription."

Understand Potential for New Services and Technologies

Librarians generally appear to be well-informed about the new technologies in information storage and retrieval through their own professional channels. They report that they usually instigate acquisitions of new technologies. The process of reviewing new services and techniques and rating the library's ability to implement should be handled systematically.

The ability of the library to secure more sophisticated automation or new and better data banks is related to institutional budget allocations, rather than generated income. But there are librarians who maintain that making the library vital to the academic, and perhaps the larger, community is the best way of ensuring that the money will be budgeted for needed services. Marketing to the faculty in terms of the best possible service will stimulate the faculty "to back the library with administration at budget time."

The University of Maine in Augusta has set up a "distance learning" system which consists of eighty-one sites in remote corners of the state, all hooked together by video cable. When Professor Jeffrey Klivans (and others) lecture in Augusta, students in the remote sites see, listen and talk back as they wish.

The network is managed through the library, specifically, coordinator Susan S. Lowe. Catalogs are online from all the U of M campuses, major independent colleges, public libraries and the State Library. Interlibrary loan is a key part of the whole program which has become, in effect Maine's network of two-year community colleges. And the library plays a key role, as it should.

Define the Customers Served, Now or Future

The customers of these libraries are primarily the students, faculty, staff, and administration of the institution. Secondarily, the general public may use the library, either in person, or in the case of the larger libraries, may access the catalog by modem. In Federal Depository Libraries, the customers are citizens of the congressional district interested in the documents. The for-fee information services tend to identify customers as "anyone who wants our service and is willing to pay for it." This may be predominantly law or engineering firms or business or industrial customers.

The library has a continuing need to understand the needs of their customers. Many librarians feel that, while the students may be their first priority, they cannot reach the students without first serving the faculty, because it is the faculty who send the students to the library. The nature of the student population changes over the years. Faculty need to adapt their instruction to meet changing needs of students. Libraries, too, need to adapt their services to these changes, and need to educate the faculty continually about these adaptations. Most of these libraries have little or no "competition" for customers, since they serve a "captive" clientele. In most cases, there are no comparable services available nearby.

For example at Bowling Green State University (Ohio), inquiries are referred to the InfoLink service when anyone who is not part of the university community asks a question that is beyond the scope of telephone reference. Basically, InfoLink provides in depth research and online searching and document delivery. There are several regular customers from the local and area businesses as well as national and international scholars who are interested in some special collections such as Popular Culture and Sound Recording Archives. The charge is $50.00 per hour for librarian's time and additional costs for computer searches and documents delivery.

Academic libraries give primary weight to faculty and students of their institutions. Priorities differ. For some types of library, at some times, the faculty takes priority; for other libraries, at other times, students take priority. If there is a for-fee information service, customers from business and industry often are first priority customers.

Determine Services Customers Want

The materials and services of the library reflect the institution's curriculum, faculty interests and research, and matters dealing with higher institutional affairs. Some libraries simply happen to have a particularly strong collection in some area, so customers seeking information in that area come to the library. Those libraries designated as depositories will have a particularly strong collection of Federal government documents.

Methods of ascertaining customers' needs vary. In smaller institutions, informal contact is used, rather than formal surveys. In multi-library institutions, the individual libraries are responsible for their own market analysis, and some of them do survey their customers. Exhibit 6-D gives an example of a user survey which could be adapted for use by an academic library. Some larger libraries assign librarians to an academic department or faculty member, to learn about special interests or needs and cooperate on book selection.

At Bowling Green a detailed four page survey (see Exhibit 10-A) was used to reach graduate students and obtain a better understanding of their research needs. Results were good with a return rate of near 60% and some rather clear ideas of what was needed. As a result a new program was installed under the acronym PERCS to provide a personalized research consultation service. Subject departments have agreed to help pay online search costs for each student.

Librarians often send their periodical lists to the appropriate academic departments, asking whether the items are used and soliciting requests for additional publications. One said, "There are two kinds of faculty: one says 'we need everything,' and the other says, 'none of this is any good.' So we have to be aware of what the students are asking for." Librarians also send publishers' releases to relevant faculty for their comments.

Records of checkouts are used to evaluate the collection, both of printed matter and of computer data bases. Requests from library users are noted informally. One library has a kiosk where customers may post suggestions or requests.

Both the size of these institutions and the traditional independence of academic departments militate against the kind of interaction found between high school librarians and faculty. However, academic librarians should take advantage of opportunities to talk with faculty members about curriculum or research.

Keep Up With Possibilities

Most librarians report that they attend meetings and workshops, read professional journals and publishers' releases, and network, to keep up with the possibilities both in traditional and computer media. They are clearly aware of the new technologies, but are held back by budget restrictions.

The libraries in the large institutions generally have computerized catalogs and both online and CD-ROM information services. One smaller academic library that is automating will have different charge levels for the new card which will be required. College faculty and students will have no charge, townspeople will pay a small charge, and students from a nearby business college will pay slightly more. The cards are a first step in automation of information services. As demand for information services increases, as it has for larger libraries, new technologies, rather than new data bases will be needed. One library has just put in a local fiber-optic network to supplant its more cumbersome single-station CD-ROM units.

The most complete library of those surveyed listed the following as information services available:

- Reference phone and desk (free to anyone)
- Bibliographic instruction free to students, faculty and staff (much of it done through the various departments, in connection with the curriculum)
- Interlibrary loan and facsimile (FAX) service
- CD-ROM network, with online searching (some free, some at cost for online time, not that of the librarian)
- DIALOG and BRS, online
- CARL system, including UNCOVER, with document delivery via FAX (and chargeable on VISA)
- Online catalog
- Film delivery through a film consortium
- Catalog and delivery of media equipment to faculty and staff

The smallest institution has two CD-ROM data bases, BRS online, and interlibrary loan through OCLC, but no computerized catalog.

Make Product Plans

Product planning in academic libraries appears to be more "product selection." If one product's worth is weighed against another, the process is implicit rather than explicit in the selection process. One librarian said, "The students or the faculty ask for it, and, if we have the money, we buy it." Actually, a library is judged not just by its resources but by what it has access to. Interlibrary loan becomes an important sales tool worth publicizing.

In some instances academic librarians said they select general reference works, leaving selection of specific materials to the individual academic departments. These departments appear to be fairly independent, preferring to make their selections without the librarian's advice. In the smaller institutions, there is some informal contact.

Student input is more often in the form of records of use. Kiosks, suggestion boxes, and provision of request forms are other possibilities, both for purchases and for interlibrary loans.

Product planning should take into account the strengths of the collection at hand. The BIS program at the University of Minnesota, for example, takes advantage of its "very large and deep" collection of biomedical documents, which serves the medical, legal, manufacturing, and insurance industries. Such for-fee services tend to be especially responsive to customer requests.

Where information services are concerned, product planning may also include efficient management of the system, to provide record-keeping for billing and analysis purposes. The same system that performs the search may simultaneously track the time, prepare the billing statement, add it to the customer's total account and prepare reports for library analysis. One

library with this more polished system found a 14% increase in searches and a 27% increase in requests for articles in just one year. This system allows the library to keep better track of its costs and provides powerful justification for the service, very useful in a climate of budget reductions.

SELLING THE SERVICES

It is difficult for some academic librarians to spend much time with potential customers outside the library. They communicate with the institution's faculty by memo and publishers' information.

Visibility is always important. When the library is in the same building as classrooms and offices, it's easier to communicate with the students and faculty. If the library is in a separate building, the librarian has to make special efforts to communicate with the college/university community.

If faculty don't assign students work that requires library use, students won't tend to use the library. Marketing to students is important especially in regional campuses, where there may be a public library available to students. "If we don't serve them, they'll go to the public library instead." Librarians need to "talk up" their collections and their services, with suggestions for how they might fit into the curriculum. Original sources are often more colorful than textbooks and they require interpretation by the reader. Periodicals and data banks may be far more timely than texts. The variety of sources provided by the library can give students various views on a topic. All of these, and other advantages of library use can be pointed out at appropriate times.

A librarian who is familiar with what faculty are teaching or researching can bring specific resources to their attention. One librarian, knowing that a faculty member was working on medical ethics, sent a related article from a publication to the faculty member, following up later with the question, "Was that article something you were interested in receiving?" One library's marketing plan included a stepped-up faculty liaison program, inviting each college department into the library for a special presentation. They will ask all departments for suggestions on how the library can improve its services.

Be Specific

While general academic libraries are by definition not specific, they do make efforts to publicize their services to specific customers for whom the services appear appropriate. Librarians often send publishers' releases and publication lists to relevant departments, but too often the approach is merely one of "do you want it or don't you?" rather than encouraging the use of something already available. Some libraries send out flyers about new acquisitions to those most likely to be interested. One librarian sends E-mail messages to all faculty every week, announcing new services or resources in the library. The E-mail can also be used to announce "freebies," to encourage faculty to read their E-mail.

Be Willing to Work

There seems to be a difference of opinion among librarians as to what is appropriate activity and what is not. One librarian decried bibliographic instruction as simply a means of qualifying for faculty status, and said that librarians would do better to take care of the collection, rather than turning those duties over to untrained clerical people. Other librarians give instruction in the use of every medium available, send out notices of new acquisitions, and put up displays relating to the academic calendar, the curriculum or new acquisitions.

Sometimes the librarian comes into a situation where his/her predecessor has left a legacy of poor or inadequate service. Students and faculty then have low expectations for the library and do not ask for services. It becomes necessary then for the new librarian to build up expectations by publicizing services. "It doesn't take long for the grapevine to spread the word that you will do research for them."

Some libraries produce brochures explaining their information services. One library gave away a free computer search as a marketing strategy during National Library Week. The librarian also advertises available income tax forms in January. She tries to get coverage in the college newspaper when she can. Another library has formed a Library Guild, which puts on programs six to eight times per year, on library-related subjects. This appears to generate good publicity, and possibly results in some financial benefit to the library. Librarians can sometimes stretch their offerings by taking advantage of their venders' services in providing instruction on new information systems.

One small college librarian called every faculty member before the start of the fall term, asking, "Is there anything we can do for you this year?" The faculty "loved this," and responded with several requests for services. Having this out of the way before the school year started was a great help to all concerned, and gave the library the chance to be of real service. This librarian's goal is to have her name and face known to every member of her faculty, so that they will be encouraged to ask her for things as they see her on campus.

The willingness of one large urban library to provide information services for the business, legal, and other communities has resulted in some large corporate donations earmarked for the library.

Make the Library User-Friendly

The availability of the user-friendly CD-ROM disks has led to considerable increase in library usage. The larger libraries having computerized catalogs permit access either by modem or in person, at no charge. Online searches are done at cost or free for students, where such services are available. (The two large libraries providing information service for non-university customers charge fairly high fees for document delivery and bibliographic searches.)

One librarian described the effect of their new, well-designed facility. "It has caused a tremendous increase in usage, because it's so convenient. It has 'acres' of counter space, and a central location for information services. There is much more interaction between library staff and users." Other librarians might look at the configuration of their facilities and the presence of helpful signs and labels, to see if other arrangements might be more convenient.

Be Enthusiastic

Enthusiasm for marketing information services appears to be a function of the number of services available in the particular library. The most marketing is done by those with services available for a fee to the external community; one might speculate on cause and effect here. The "high service" libraries often do considerable marketing when a new service becomes available, mailing brochures to potential customers, attending and speaking at professional association meetings and conventions, and advertising in trade journals.

Librarians with a wide variety of services available report that they are already swamped with requests. When a large library converted to a fiber-optic CD-ROM network, they logged 1,700 hours of service in the first month. This inundated the interlibrary loan librarians, who can't keep up with the work load. The information services specialist said, "If we were to do any new marketing, it would clearly have to lead to an increase in resources, finances, information, or personnel."

In libraries with extensive information services, there is visible enthusiasm for providing rapid turnaround of service. One librarian said, "It's fun and hectic. To enjoy it you have to like to run in the fast lane, be extroverted, work under pressure, play 'beat the clock.'" She reports that the staff has high morale and shows pride in their work.

Set Standards

All librarians collect data on usage (manually or through computer systems), but few of them appear to use the data for planning or goal-setting. Libraries with for-fee information services set a high premium on rapid turnaround time for the customer. Twenty-four hours is a frequent standard. "In academia, a PhD student can wait a week for a reference; in business they want it fast and are willing to pay for it," said one librarian.

The most highly-automated for-fee information services set standards for profitability, as well as service. They know their costs and charge accordingly. For example, they charge $40 per hour for manual searches. But, if a customer is not happy with their work, they will do it over at no cost. This information service generates 20% of the library budget, so they are aware of how the rest of the library depends upon them. Another service said, "If they're willing to wait for it, we'll go anywhere in the world to get something."

One librarian reported that they are currently assessing the quality of their reference service, using the Charles Bunge evaluation techniques discussed in his doctoral dissertation for the University of Illinois and then abridged in the Illinois State Library publication "Professional Education and Reference Efficiency" noted in the bibliography. Then they will move to circulation and other aspects of the library. Their staff is "vitally concerned with people getting what they want."

Blow Your Own Horn

Most educators would agree that the library is an integral part of any educational institution, especially one of higher learning. With rising costs and declining budgets, librarians have to fight for the money needed to keep abreast of the rapidly-expanding information base. Making clear the essential role of the library is one way to compete successfully in the battle for resources.

Librarians do not always make the indirect connection between the services rendered to the academic and the larger communities and the availability of funds for more and better services. One who did, said, "We don't need to publicize to increase our use. Our image is important with faculty and administrators for internal support. Business and industry can provide external support." This library, providing at-cost information services for business and industry communities, has generated goodwill resulting in generous corporate donations to the library. Their Library Guild also generates favorable publicity which may translate into increased funding as well. TV publicity about library services secured modems for the high schools, to enable students to dial into the university catalog.

If community college librarians have wide access to other institutions' library catalogs, online librarians should spend time making sure the admissions office understands this. Community colleges are the lowest cost form of higher education and with online catalogs they can match in effect the library offerings of their much more expensive four-year competitors.

Position the Library in the Organization

In some universities the library system has been put under the wing of a campus-wide department of communications or data processing. This should be resisted since it moves libraries a step away from their natural constituency - the faculty and students. Moreover, while the two functions may share concepts or even hardware, their work is quite different. Data processing functions deal with a limited, though growing quantity of data concerning the university. Libraries must be prepared to seek information anywhere the intellectual needs of the university may require. Functioning under a data processing department may limit the library's effectiveness.

Close the Loop

In an area as fast-changing as information services, all of the steps indicated above are actually parts of a continuous process. There is a continuing need for librarians to be alert to changing needs of students and faculty, and new products and technologies. The steps in the marketing process are not something a library goes through once every few years. Once the principles are understood, in an effective program, self-assessment, market definition, product planning, product creation (or selection), and selling are taking place all at once and all of the time.

Summary: Academic Libraries/Media Centers

* Define the role you want to fill.
* Assess services currently provided.
* Look for potential for new services and technologies.
* Define your customers, now or future.
* Find out what these customers want.
* Plan your products.
* In selling,

  Be specific
  Be willing to work
  Make the library user-friendly
  Be enthusiastic
  Set standards
  Blow your own horn

* Keep recycling through the marketing process.

CHAPTER 11
CORPORATE AND OTHER SPECIAL LIBRARIES

Originally this chapter was titled simply "Corporate Libraries." It was broadened to include special libraries not discussed in separate chapters in this book. Historical, museum, newspaper, theological and information vendor organizations, to name a few, maintain libraries. It is clear that almost every type of organization boasts a library, however modest.

The suggestion for special libraries is to start with this chapter, then to read the materials on other library types, looking for similar organization, collection, and technical situations. Each chapter written for a particular type of library deals with unique problems and opportunities; however, all libraries face the same basic issues.

When looking at corporate libraries, one thing becomes immediately evident: today they are probably called something other than "library". From that traditional title to the often-used "Information Resource Center," there is a wide range of designations. Likewise, the range of missions and services offered varies greatly.

This trend toward new names for libraries and librarians is not a trivial matter. Within many organizations "libraries" and "librarians" are seen as anachronisms with little use. Whether or not that view is justified, it makes library performance more difficult. Renaming the facility and personnel will not alone change the library's status: enhanced function and value will. The title of "Information Specialist" may be more descriptive of the contemporary role of librarians. But a change in title alone will not change customers' attitudes. They will expect new and improved service.

Traditional library facilities do exist within many business organizations, dealing primarily with reference material. Scientific and engineering collections supporting technical and research personnel may fit into that traditional mode. Many corporations have law libraries, performing much as they did in the past. But libraries are changing rapidly, as the variety of media and the quantity and volatility of information increase.

MEDIA

Collections that used to consist of books and periodicals now include microfiche, CD-ROM, videodisc, online data bases, automated catalogs and search mechanisms. In fact, a current definition of a library collection must include logical components in addition to those that physically exist; logical in that information presented to a customer on a computer display may have been dynamically constructed from data in several records, files or data bases at the time it was requested.

LOCATION

Historically libraries were defined by their collections and by the buildings that housed them. Those physical bounds have become less defining. As media have changed the nature of collections, the physical location of information has expanded far beyond the library walls. If a library were to eventually contain only electronic access to information, that is, personal computers connected to information services, what will keep those devices within library walls? If they are physically dispersed throughout an organization, does that mean the library and the librarian's function no longer exists? Clearly, that is not the case.

CONSTANT CHANGE

What was once considered static information becomes continually more dynamic. CD-ROM bases are updated frequently, online data bases often daily, so today's research may be out of date tomorrow. Information that in the past may have been current for years or decades, may now be replaced with new material in days, weeks or months. Whether or not librarians are comfortable with this trend, they must keep pace with the changes in technology.

One thing has not changed. Specifically, libraries never did have a monopoly on information. If the availability of material or service was not acceptable, customers went elsewhere for information or created their own library. With today's technology, creation of an information resource function may be as simple as adding a modem to a personal computer and obtaining a user ID and password for an online service.

MARKETING PLANS & ACTIONS

During the self-assessment and market definition phases of your marketing program, two perspectives should be used: the current or traditional library functions you provide and the new emerging technologies that can provide significant new functions. New facilities will merge with the traditional library, not replace it. The dilemma, as always, is how to preserve valuable characteristics of the old while embracing the new.

No matter where your library fits in today's organization, or what its mission, it should be defined, or redefined, to correspond with corporate business objectives. Those may not be apparent, but should be derived from top management's stated goals (check the annual report). How can a library hope to compete for corporate resources without a plan that fits the company's desired path today, and changes with each turn in that path?

Concentrate on how *much* is spent throughout the corporation for information research, retrieval and distribution, not on how *little* your library has to spend. The total is at stake. If the library or Information Resource Center can better exploit those funds, and can provide information services with more value to its customers, other groups will be less likely to invest in duplicate facilities. Unless you are part of a unique organization, *no one* in the corporation will know what that total expenditure is or who is spending it.

The new corporate library should have as its objective providing *information expertise* to customers. What is important is knowing what information sources, or data bases, are available, when and how to access each, and how to interpret the results. That expertise resides within the librarian, or Information Specialist, not in the physical library. A library equipped with the latest technology and superb collections, but no staff, will be far less valuable to its customers. Effectively providing information expertise will always be a critical success factor for a corporate Information Resource Center.

If customers access an online data base using a PC in their own department, the librarian has not necessarily lost control. In the past, customers relied on librarians to teach them how to effectively use tools like the card catalog. Today they expect the same support and direction as they learn about contemporary research and information tools.

USING THE LATEST TECHNOLOGY

Who is best able to use the new technologies, customers or librarians, may change over time. As further technical advances are made, less specialist talent should be required to effectively perform information searches; however, few people expect experts to become unneeded. Trivial, repetitive or "canned" searches may be performed by many customers, but performing a complex research task effectively and efficiently (both essential), will continue to require trained competent specialists. Some librarians, like Lee Faulhaber of the Federal Reserve Bank of Cleveland, have been asked by their customers to provide training in the use of facilities like DIALOG. Once the scope of training is evident, those customers are normally reluctant to assume responsibility for structuring their own searches. They continue to rely on the librarian's expertise to complete the research task.

Several major factors affect customer use of technology. Understanding how to structure an information search is too difficult and time-consuming for most people. An Information Specialist who is available to do research, and does it well, can provide the customer with superior results at a lower cost. Some librarians, to maximize the effective use of funds budgeted for data base searches, purposely bar customers from using equipment, because charges can escalate rapidly with misdirected, poorly structured searches.

Long term, new software function will allow customers to do more of their own research. Librarians must continue to provide value as information specialists, educating and supporting those they serve. When the librarian's relative expertise (as perceived by the customer) disappears, so will the customer's willingness to pay for support.

INFORMATION PROVIDERS

Online database services constitute one of the fastest growing sources of information today. While not a new phenomenon, these specialized services provide access to a wide variety of subject matter, normally much more current than printed material would be.

Many databases are available through systems that supply customers with access to multiple applications, like DIALOG and NEXUS. Other specialized database providers market their services directly to their targeted customer sets.

While it may not be apparent to many corporations, opportunities exist for companies to sell access to databases developed, perhaps, for internal use. Data that are required to run a business, and which may cost significant dollars to maintain in a current status, may be attractive to other firms. This would not include those cases where information actually gives a corporation a competitive advantage. Librarians can play a significant part in identifying databases that can be sold directly to a newly defined set of customers. Several examples of companies now involved in selling databases developed from within the organization are described below.

Organizations selling unique information services can be found in multiple industries. Newspapers in many cities sell personal computer access to their well-indexed archives. Since newspapers are produced with computers, current material is readily added to databases. Over time,

earlier news stories will be captured using scanners; however, newspapers will probably emphasize only special subject areas, or abstracts pointing to microfilm records. Photographs can also be scanned and appended to the text of news stories.

John MacCallum, MIS Director, has implemented such a service for The Halifax Herald Limited, in Nova Scotia. He believes customer demand and revenues will continue to grow, allowing timely recovery of the initial investment and making The Halifax Herald Limited more competitive with other media. His customers include government agencies, corporations, law firms, schools and local media (TV and radio).

Numerous newspapers in the U.S. and Canada are currently offering their own database services, or are actively developing new systems. Little has been done, to date, to standardize software, storage and indexing techniques or to link systems together.

A commercial database system providing ground water information worldwide is available from the National Ground Water Information Center, in Dublin, Ohio. Janet Bix, director of the Center, has emphasized the need for surveying customers, measuring their reactions to information provided and, equally important, how user-friendly they think the system is. This marketing-oriented approach drives continuing improvement in the system, and is essential for long-term financial viability of commercial information services.

Libraries will benefit from the variety of information sources. The balance between the use of external online services and internal systems, like CD-ROM, must be determined by each library's customer requirements.

SUPPORT FROM VENDORS & INFORMATION SUPPLIERS

Determining the information needs of your customers is essential. Understanding all available information resources is equally important. Your solutions must match those two elements to provide value to your customers. And in implementing each solution, every available resource should be utilized.

The suppliers of information services like DIALOG or NEXIS (there are, of course, many suppliers of specialized information services) can provide support to a library at all stages of product development. Assisting you in the identification of solutions for your customers and training you in how to access the information services they provide are jointly beneficial activities.

The suppliers of the data bases accessed through those services also offer education and technical support aimed at improving the librarian's search expertise. Richard Harris, President of Predicasts, in Cleveland, emphasizes that this education is crucial for building the specialist's skills. Predicasts offers training, from basic to advanced searching, at both U.S. and European sites. In addition, they can assist librarians in identifying their customers business information needs.

Ongoing contact with the suppliers of information services, and utilization of their education and support offerings cannot be dismissed as nice, but unnecessary. Corporate libraries must leverage these resources to maximize the value of services the library provides to its customers.

REPORTING STRUCTURE

The value of a corporate library is often expressed by its position within the corporate hierarchy. Reporting to the Building Manager may be evidence that the library is viewed as an administrative expense. Reporting to the Chief Scientist or Director of Research may well emphasize the importance of the library in research and development. Wherever the library reports in the corporate hierarchy, gaining executive support for the library's mission will make it easier to provide superior customer service.

At the Nordson Corporation in Westlake, Ohio, Rosemary Davidson is Manager of Information Resources. She reports to the Vice President of Finance and supports all company locations. Her key to success is "understanding corporate objectives" through the annual strategic planning process and related progress reports. Recognition of the importance of information research for engineering, marketing, legal and executive functions supports the Center's position in the corporate organization. There is more to the Center's success: Davidson's department produces not simply references to information, but completed research reports for her customers and maintains open communications through a strong marketing program.

The ideal environment for the corporate library may be difficult to achieve. If the library is correctly situated in the organization, with executive support, a clear understanding of corporate business objectives, and access to customers to ascertain needs, then the resulting product plan will have more chance of success.

Failure to have that ideal environment does not mean you should not proceed with your plan. In Chapter 9, "Closing the Loop," the continuous nature of the marketing process was discussed. If you cannot achieve the ideal immediately, there will be other opportunities to cycle back through each element.

SELLING

The Selling phase of marketing requires two actions: telling customers about available services (INFORM), and providing the expertise and support to make those services work (PERFORM).

Informing customers about the library can be done in a variety of ways: newsletters, displays, flyers, and personal contact. Choose the media that best fits your customers in terms of geography and their breadth of interest.

At the Cleveland headquarters of BP America, several libraries serve different organizations. A brochure provides customers with brief descriptions of collections and services provided by each facility. The libraries meet to coordinate functions and support each other as the BP Information Providers Network.

Ongoing performance builds customer confidence in the library staff. Lee Faulhaber, Librarian at the Federal Reserve Bank of Cleveland, reviews the planned research projects, then provides updated information for each researcher on a regular basis. He finds that this continuing attention to customer needs strengthens the library's position as a primary source of information.

Faulhaber also uses a variety of publications to inform his customers of new acquisitions. He distributes copies of the tables of contents of each periodical received, again targeting specific researchers whenever possible. The results show increased reliance on the library staff for the support of research.

For corporate libraries, no guarantees exist. Becoming an integral part of the business plan, providing innovative information service and soliciting customer feedback on a continuing basis are all essential success factors.

Summary: Corporate and Other Special Libraries

* Libraries exist within many corporations and other organizations, with a variety of missions and names; no single model will fit all special libraries.

* The nature of corporate libraries changes constantly. Librarians must deal with issues such as:

  - widening range of media types.
  - electronic libraries spread over many locations.
  - an expanding and changing universe of information.

* To market effectively, you must:

  - address corporate/management goals.
  - know total information cost of the organization.
  - provide expertise to customers, not just data.
  - keep abreast of new technology, use it to solve customer problems, and teach them how to use it.
  - become a vendor if you see a market for your internal databases.
  - explore available suppliers of information, use vendors resources to improve your customer service.
  - leverage your customer goodwill to support the library's position within the organization.
  - emphasize communications with your customers.

* Respond rapidly to changes in the corporate environment by adjusting library objectives and services to new customer needs.

CHAPTER 12
GOVERNMENT LIBRARIES

There is no single model for government libraries, since the broad range of organizations includes everything from small municipalities to massive federal agencies. Missions vary from archiving to supporting high tech research and development. Customers served may include the public but will be, more probably, government employees.

In this chapter, archival functions will not be considered; the discussion will focus on government libraries that provide information services to customers using current collections and technologies. The range of materials and services offered is comparable to offerings in many other types of libraries. The staffs of corporate, law, medical and public libraries deal with the same problems faced by government libraries. Chapters 11, 14, 15 and 16 should be read in conjunction with this material.

Of course, developing a marketing program for government libraries involves the execution of the same tasks found in these other chapters:

- Gain management support for appropriate financial resources and rational reporting structures.
- Determine the information needs of the organization.
- Make effective, cost-efficient, usable solutions available.
- Sell your customers on the value and appropriateness of these solutions, and on the value of the library as the service provider.

MANAGEMENT & ORGANIZATION SUPPORT

If you do not have your organization's support initially, your marketing plan may begin with a trip up the reporting chain to sell management on the requirement for a review of library mission. A stated objective of a review will be to establish the value of the library to the organization. Concentrate on the organization's ongoing recognition of and support for the library's mission. Whether the name is library, or information resource center, there must be acknowledgment of the intrinsic value of your existence. If you do not have a credit balance in your organizational "account," you risk losing influence in future library decisions.

Beyond intrinsic value, you must establish the benefits your customers currently receive from library services. Include those that are tangible, cost-reducing or revenue-producing, and those that are intangible, relating to the quality of the organization's work product, and the goodwill expressed by persons outside your organization.

With current benefits and values established, surveying or interviewing customers to determine their future needs is a natural progression. Even customers who place no value on today's library can help define potential new services and their benefits.

SELF-ASSESSMENT

In Chapter 4, "Self-assessment," the discussion centered on services provided and their quality. Government libraries require those same assessments, but should also evaluate where they report in the organization and what total library costs are. The library's position in the reporting structure will directly relate to budgets. If the library has no functional connection to the department, division or agency it reports to, (e.g., it reports to the building manager, but supports scientific research), the library budget may appear to contain virtually all monies spent on information services. If it is well integrated into the larger function, information expenses may show up as line items in the budgets of other departments.

The important point is that the library's initial assessment should identify all sorts of information services: personnel, overhead, equipment and supplies, as well as collection-oriented items like materials, subscriptions and fee-based services. Equipment costs and charges for database access now charged to other departments are logically part of the total being spent. You should attempt to consolidate all expenses, not because the library must automatically control them, but because your entire organization should be aware of what is spent for information resources.

WHEN CUSTOMERS DON'T USE YOUR SERVICES

The library may be bypassed by other departments who maintain their own collections or access online databases without librarian support. Some of the many possible reasons for this are:

- customers' belief that they have subject expertise needed to effectively search databases, and the librarian does not,
- geography separates customer from library, leading to inadequate response time when the library is asked to perform searches or provide materials,
- customers believe library is not staffed sufficiently or does not have well-trained people,
- customers may want to control the money, rather than allowing the library to allocate it.

Whatever the reasons, the library staff must include them in the analysis of customer requirements. They may represent serious problems to be resolved or unrecognized opportunities to provide expanded services.

OUTSOURCING

Faced with a unstable long-term budgeting environment, government agencies attempt to implement flexible solutions. Clearly having some services provided under relatively short-term contracts permits budget cuts to be absorbed more easily. Contractors are not civil servants, and if necessary for budget reasons, can have their services terminated. This same method is used extensively today in the corporate community to reduce permanent headcount and all of the associated benefit costs.

Outsourcing, or contracting out, of library functions is not the norm for governmental units, but is certainly not unheard of. Agencies may fully recognize the value of their libraries, yet choose to outsource those services. Government libraries can counter the threat, (and it is a threat to long-term, stable service), but every librarian must recognize there is no way to guarantee the existence of every library for all time.

Marketing can be a highly effective way to establish the value of a library to the customers it services. The process of determining customer needs, Chapter 6, "Product Planning," must emphasize agency organization, missions and sub-missions, and expected longevity of mandated or legislated function. Virtually all government libraries would be hard pressed to justify their existence in terms of revenue produced versus expenses.

SELLING

Selling may be more important for a government library than for any other type. Since many government units are budget driven and work on one- or two-year planning cycles, the library must ensure communications with customers are open and continuous. The budget cycle forces reassessment of needs, and if customers have positive memories of the library service received they will be less likely to dismiss its value.

STATE LIBRARY OF OHIO (SLO)

Unique to government libraries in Ohio, the State Library has a twofold mission. It is responsible for maintaining a library for the state government and legislature and for providing a statewide program to develop and coordinate library services.

All types of libraries are assisted in some way by the SLO; there are over 4,000 library service outlets in the state. Through its staff and a network of field units, the SLO provides technical and consulting services to Ohio libraries.

Summary: Government Libraries

* With a wide variety of needs, many different solutions will be developed for government libraries. Use the techniques described for other special libraries where appropriate.
* Establish the library's position in the organization and cultivate customer support.
* Make certain the total of all expenditures for information services is recognized.
* Determine the inhibitors that keep your customers from using the library. Fix the problems.
* Establish new value in your library service and sell that value to your customers.
* Use every available resource to help build your marketing program.

CHAPTER 13
INSTITUTION LIBRARIES

Institution libraries are in juvenile correctional, adult correctional, mental health facilities and those serving the handicapped and disabled. While state government is supportive of library service in these institutions, it in no way reduces the need for marketing. Education and library service can be significant in the treatment program of the institutions. It is important to help this controlled population maintain an interest in the world and also to acquire new skills and interests.

TYPES OF INSTITUTION LIBRARIES

In some institutions, two libraries are maintained: one for the staff and the other for patient or inmate use. The staff library is strictly for professional use, and may include law and medical books, as well as various professional journals that assist the worker in his/her applicable field. This library might consider suggestions made in Chapters 14 and 15 pertaining to law and medical libraries.

The second and more common type of library found in institutions is the patient or inmate library. It is comparable to a small public library where individuals have access to a variety of literature and audiovisual material. Unlike public libraries, however, prisons are mandated to provide legal information. Responding to this requirement by providing this information not only in books but with actual forms and legal documents is an example of responding to this market in a positive way. One prison librarian notes that the library is the only place in the institution where the response to inmates is "yes."

MARKETING IN A PRISON ENVIRONMENT

Prisons present perhaps the original captive audience and mental health facilities are also restricted environments. Service is no less an important factor in such an environment and in a way is more important since most of those customers are headed back out into society.

Moreover good service is important because there is very real competition for the library both within and beyond the prison gates. Fred Gaieck, librarian at the Women's Reformatory in Marysville, Ohio points out that inmates have a choice of working on craft projects, exercising in the gym or doing nothing in the cottages or dorms. Moreover in many cases inmates can purchase outside reading material by mail direct from publishers. Generally families cannot send reading material to inmates through the mail. In competing successfully with the other claims on inmates' time, librarians use many of the same strategies as would be used by any small public library. Some of them are:

* Maintain a quiet environment. The contrast to noisy prison space will be especially appreciated.

* Find which inmates have been library users on the outside. They are the most likely users when in confinement.

* Prepare to respond especially well to a few heavy users that appear from time to time.

* Provide a learning environment to support a variety of subjects and levels.

* Avoid relying too much on meeting formal standards. Formalization does not mean that marketing will cease.

* Move with the flow and adapt to changing needs. Each new busload of inmates may bring people with new interests, trainable skills, or other needs.

SURVEYS FOR NEED ASSESSMENT

Building on these strategies listed above, a library should determine the needs of its customers. Chapter 4, "Self Assessment," describes some ways to do this through customer surveys. There is more to be found on surveys in some of the chapters on other special libraries and particularly in a special appendix entitled "Surveys to Gather Marketing Information."

Each institution library must, of course, develop its own survey methods, though in some states there is a mandate for an annual needs assessment survey. Exhibit 13-A is a brief survey of interests used at an institution in Illinois. Exhibit 13-B is another example of an inmate survey in this case from Eva Ballenger, Pickaway Ohio Correctional Institution. She reports that the responses are regularly used to guide collection development. For example: 12 people out of 167 filling out the survey expressed an interest in philosophy and so there will be philosophy in the collection.

At the other end of the spectrum, from philosophy, many prison libraries stock a good collection of children's books. Recognizing the reading limitations of many inmates there have even been cases in which the librarian will sponsor storytelling every few months. Further, some customers or potential customers may show an interest in such media as large print and tape recorded books. The use of recordings is dependent on rules covering tape players.

Surveys, however, do allow the staff to have at hand the particular needs of individuals. In yet another example, at the Correctional Reception Center in Orient, Ohio, Alice Walker did a survey of the inmates to discover exactly what types of magazines and other materials each one would like in the library. In one of these annual surveys a group of inmates indicated they wanted something a little more serious, more issue-oriented. Out of these responses has come a planned reading and discussion seminar. Also a revised library handbook is now given to each inmate during orientation.

REACHING OUT TO RESIDENTS, INMATES AND STAFF

In addition to formalized surveys, librarians find that talking with residents when they come to the library does much to reveal their interests. Diane Goins, at the Northeast Pre-Release Center in Cleveland, Ohio, reports a desire on the part of several residents to obtain information on the publishing industry — how to write for publications, how to get published, etc. Some such material is now available.

Reaching this sheltered population also calls for ordinary advertising and public relations through posters, posted memos, displays of book jackets, magazines, etc. As a result of requests for advertised materials, conversation develops and other interests and needs are discussed.

"Lunch-time" talk and conversation throughout the day is a direct and useful way to learn about the needs of the staff and patients/inmates. It also helps to relay what is currently available in these libraries and informs other staff workers what they can expect to find. Direct communication is a valuable way of generating interest and awareness in institutional libraries. In a more structured sense, however, surveys are very helpful. Often staff time is at a premium in these institutions and many find little time available to implement all parts of the marketing process.

Another type of selling effort must target the administration or director of the facility to request sustained and increased support. Leadership must be convinced that library money is well spent. One-to-one communication is preferred for this type of lobbying with frequent repetition. It is an educational process to make absolutely sure the decision makers understand how the library supports the goals and objectives of the institution. Professional association standards also support the needs of the institution library and ultimately the customers. Evidence of a budget well-spent, influencing the attitude and behavior of those using the library is critical for this support.

LIBRARIES: THE LINK TO THE OUTSIDE WORLD

Working with the teachers, librarians can create a learning environment not present elsewhere in the institution. By this means inmates are urged to improve themselves and learn to cope with their prison environment and in the outside world.

Librarians in these controlled settings have an unusually important opportunity to serve not only their customers but the society at large to which many will return. Paul B. Weinstein of Portsmouth, Ohio writes of his experience teaching at the Southern Ohio Correctional Facility in Lucasville. He says in a *Plain Dealer* (Cleveland) article (March 25, 1992):

> "Education is a key to keeping them out (of prison). According to research covering several states, the rate of recidivism, or return, among the paroled and released prison population is 35% to 50% in the first year and up to 87% after three years. For those who have received a post-secondary education, the rate falls dramatically—below 15%! Taxpayers looking for programs that work can use prison education as a model of cost-effectiveness."

Weinstein bases his conclusions on an unpublished study done at Wilmington College (Ohio) in 1986 by Jarrell Holloway and Paul Moke, entitled "Post Secondary Correctional Education: an Evaluation of Parolee Performance." Though the study is about education, results might be stretched to include libraries under the same favorable umbrella. Institution librarians would like to think so. Whatever the record may be on recidivism, it is the job of the institutions librarians to serve the most customers possible in the best way they can.

Summary: Institution Libraries

* Service is the key to running a good library. It is the same in an institution as it is anywhere else.

* Inmates will respond to surveys that speak to their concerns/needs.

* Informal conversation will reveal interests, needs.

* The director, administration, and/or decision makers must understand that the library supports the goals and objectives of the institution and money for libraries is well spent.

* While there may be some positive connection between recidivism and educational/library activity, the important work of the library is to serve customers in the best possible way.

CHAPTER 14
LAW LIBRARIES

Near the core of any law practice is some kind of library. For a solo practitioner or corporate lawyer it may be a few books and information services in his/her area of practice, with supplemental help through other resources such as a county law library.

One of the reasons lawyers join together in firms is to share library and information resources. Firms that are large enough to have a professional librarian (or even a non-professional) should provide for a marketing plan to make the best use of this valuable asset.

NEED FOR A MARKETING PLAN

Where there is a library there should be a library marketing plan. Law libraries in particular will benefit from defining goals and means of reaching them in a careful considered marketing plan. Details of the plan depend upon the location, size, budget, customers, and especially the type of law library: corporate, law firm, law school, institutional, county, or even public library.

The marketing plan will help organize the librarian's efforts to increase the visibility of the library, justify its budget, improve awareness of the services and products the library can provide and obtain information on increasing needed adjustments in service or collection. Establishing customer satisfaction is, by itself, the most important marketing tool.

TYPES OF LAW LIBRARIES

Every law library needs to devise its own marketing plan to provide the best service to customers as well as to justify its cost. The following paragraphs include some suggestions for each of the major law library types. Of course, suggestions for one library type are relevant to another and for that matter similar to others described in Chapters 10 through 17. Certainly, a law school library fits within the academic library category and a law firm library has much in common with a corporate or medical library. Further any special library looks to public libraries for ideas.

Law Firms

Every law firm needs a library, or at least needs the services a library provides. Regardless of their importance some law firm librarians believe they labor in obscurity and perhaps are underappreciated. Budget cuts may loom. An organized approach to marketing and creation of a marketing plan can assist the underappreciated and the successful, secure library to:

- Analyze the current situation.
- Define the market served.
- Plan new products or revise present ones.
- Devise new or improved way of selling services, improving visibility.
- Plan for future needs, renewal and constant improvement.

These points are, of course, the ones covered in earlier chapters describing the steps in any library marketing program. A sample marketing plan arising out of these points is in Exhibit 1-A. It was written by a law firm librarian in Phoenix, Arizona. Though written for a law firm it could apply in form and objectives to any special library situation.

A careful reading of the plan in Exhibit 1-A shows that some of the following topics are covered:

Executive Summary - with specific goals for improvement in billing and usage.
Resources - detailed description of services, space, and staff.
Market - description of user population and how it is served.
Competition - recognizes both outside services (information brokers, etc.) and inside attorneys/staff who bypass the library.
Missions - clearly aligning firm's goals and those of the library.
Strategy - how goals will be met.
Costs and budget outlook - stating in this case that expanded objectives will be met with present staff and minimal additional equipment. Earlier cost reviews by the librarians brought a 12% saving in annual budget by use of a tighter policy on the purchase of publications.

Once the basic plans are made and new products, if any, have been arranged, efforts turn toward selling and promotion. Many law firm librarians have proved very adept at communicating. They aim to:

- Generate trust.
- Respond promptly to inquiries, even if the answer is not immediately available.
- Circulate information on newly arrived source material, or even old material that may be overlooked.
- Help train newly arrived attorneys in how the library can assist in research.
- Make frequent door-to-door contact with each attorney or other library user. Visibility is the key to success, and in some severe cases, to survival.

Law School Libraries

Academic law libraries are of course much like other academic libraries, the subject of Chapter 10.

They have an especially narrow customer base. Most of the customers faculty, and students, are located in a small area and come into contact with each other often. Thus word of mouth can be very effective.

Providing legal research training for first year students is essential. Training in the use of online databases is especially so because of the high cost of careless searches. First year students must get started right. Encouraging professors to include library-based assignments in their classes will also increase the use of the library. If the professor thinks that the library is an effective learning tool, he/she ought to convey that message to students.

County Law Libraries

County law libraries are established by statute to serve the bench and bar. Small firms and solo practitioners may have nowhere else to turn for comprehensive library service. Larger firms use the county library as an

important backup. Reaching this diverse customer group for marketing purposes is a much more difficult job than in law firms where librarians can make their contacts door to door.

Mail lists and county bar publications are useful ways to reach users and potential users. Some have tried open houses, perhaps in connection with a new service or bar association meeting.

Those county law libraries that sell memberships to supplement operating funds from public sources have a built-in support group. Members can be very helpful both in determining needs and in selling the benefits of library service to nonmembers.

Small county libraries have a difficult time keeping up with the requirements of those they serve. Among Ohio's 88 county law libraries a recent study showed about half have no full-time staff. As a practical matter the smaller libraries and their local customers will look for help to the larger skilled and well-staffed county law libraries.

Service to the general public is not really a marketing issue since county libraries are not likely to seek such customers. A recent survey in Ohio, however, found that more than half do serve the general public, though it is not a large part of the traffic. Law librarians have long since learned to avoid any hint of giving legal advice so the general public's use is likely to be finding certain statues, articles, or cases. In some instances the local public library will take the lead on legal questions and obtain answers for the customer through cooperation with the nearby county law library.

RESOURCES

Online databases and CD-ROM products continue to grow in importance in law as well as everywhere else. Whether the library has WESTLAW, LEXIS/NEXIS, DOW JONES, LEGIS-SLATE, HANNAH or GONGWER (for Ohio), DIALOG or other databases is dependent on the individual library. The law library may be able to use database vendors' marketing and information packages to inform customers about these services. Many of these databases require training and passwords before the user can take advantage of the service they offer. The incentive of saving time, even though it costs a little more, is enough to encourage the user to learn as much as possible about the service. At the same time that the database training sessions are conducted, the librarian should use the opportunity to speak about some of the other library services. Online databases can be used to market the law library. By prominently displaying and informing the library's customers about these services, the library takes the lead in showing that it is technologically up-to-date.

Selecting resources is a key marketing issue. If 50% of the firm's clients and lawyers focus on real estate law, then 50% of the library's collection budget should probably be dedicated to real estate information. Lawyers often work on a variety of cases, so frequently offered subject-specific training sessions will enable them to rapidly learn about other legal areas.

Some outside help may be needed in this important matter of material selection. Evaluating newly available material and such questions as the mix of electronic and hard copy versions of similar material is a constant challenge. The newsletter *Legal Information Alert* from Alert Publications, Inc. in Chicago provides critical reviews of resources and even occasional articles on library marketing. They have a companion publication on the business side called *Business Information Alert*.

SEGMENTING THE MARKET

While law libraries seem a narrow market, they really serve many small segments, each with its own needs and level of influence in the organization.

One law firm librarian sent a comprehensive needs survey and found the following breakdown by market segment:

Partners	58
Associates	73
Of Counsel	4
Summer Associates	15
Administrative Staff	10
Paralegals	48
Secretaries	89
Staff	54
Office Assistants	32
Total	383

The librarian was encouraged to find a much better rate of survey return from the attorney segments than from the others. All, however, provided good, useful information on the how and why of each segment's satisfaction with the library. A copy of a similar survey is in Exhibit 14-A. Careful analysis of returns by each market segment provided an indication of how differently the market segments view and use the library. Complaints and problems are picked up or confirmed. For example, several surveys found a continuing problem with circulation control and supported the proposed solution, that DataTrek library automation software be upgraded to allow for tracing circulated material and recording information on usage and non-usage.

IMPROVING EFFICIENCY

Putting together a library map and a guide to services can improve the customer's efficiency in using the library. By informing the customers of timesaving services, special databases, availability of a fax machine, etc. the librarian can be of great value. In any question concerning information technology the librarian must take a leadership role.

Frequently held training and orientation sessions dealing with specific legal areas provide the librarian with more time by increasing customer familiarity with the services and products offered.

The librarian must be as familiar as possible with the services and products the library can provide. By responding to a request with a few very good products, rather than a lengthy bibliography, the librarian reduces the turn-around time and improves the quality of the service. By fully understanding the underlying objective of the request, the librarian can be more accurate and thorough while saving time for the customer.

IMPROVING PROFESSIONALISM

Deciding to improve the professionalism of the services provided is another potential result of the marketing plan. Consistent use of a well-designed logo enhances the image of the library. Return calls or leave messages on the same day. Let the customer know that a request is being worked on even if it is not done yet. Include a cover note with each request response stating how the search was done and by whom. Depending on the volume of requests and the particular law library, following up on completed requests a few days later could make the difference between a satisfied or disappointed customer.

Involving the library in a continuing legal education program can also improve the image of the library as a professional organization and is another good information distribution tool. Including seminars by professionals on subjects on which the library has a strong collection will emphasize that collection to the customer.

Not all libraries have access to the databases, collections, and sources that a particular customer needs to complete his search. Public libraries are of course good supplementary reference sources and information brokers may be well worth their fees on special projects. Making customers aware of these additional resources enhances the overall service provided by the library.

SELLING THE SERVICES

Knowing customers' needs makes it easier to inform them of the services and products available in their interest area. Information can be conveyed:

- in newsletters
- by displaying and distributing specific subject bibliographies
- by submitting articles to legal publications
- by speaking at meetings
- by targeting individual customers and contacting them with information about their areas of interest and expertise
- by word of mouth
- by teaching users research techniques in specific fields

Just informing the customers of the available services does not constitute a marketing plan. Only when the library knows what its clients want can it start to improve and sell those services. Customers will always be interested in a professional and timely service, but any product or service offered that will make either the librarian or the customer more efficient will improve the library's value and image.

Furthermore the library has an important extended customer group in the firm's clients. While most research ultimately benefits clients, the degree to which actual library service can be billed out becomes an important economic consideration. A law firm marketing director might provide assistance on this and other parts of the marketing task.

FINDING THE TIME

Most librarians will say there is absolutely no time to market in a law library. The staff is or should be stretched to the limits in providing service to the users. Marketing is important, however. The librarian must dig out the time to read this handbook and use it. It is only by buying into the marketing effort that a library can show and eventually increase its value to the organization. Likewise a well-organized marketing program can make the staff of the library much more aware of their important position in serving the users and keeping them happy. It will increase their energy and enthusiasm. It will result in better evaluations at the end of the year and the best part is that it will improve service to the users.

Summary: Law Libraries

* Law library customers are people with high expectations and often urgent needs to which the librarian responds.

* The customer base seems narrow, but in fact it is a collection of many sub-customer bases. A large law firm may serve as many as nine identifiable customer groups.

* Law librarians must take the lead in data base technology: teaching, evaluating, promoting the most useful products.

CHAPTER 15
MEDICAL LIBRARIES

Service is the key to success in medical libraries as it is in any library. Determining just how to serve customers in each situation is particularly important because medical libraries are so different.

TYPES OF MEDICAL LIBRARIES

Of some 2400 U.S. medical libraries recognized by the R. R. Bowker Annual (1992), 212 are in universities and colleges. Chapter 10, "Academic Libraries/Media Centers," may be of particular interest to medical librarians in those situations.

The largest number of medical libraries are in hospitals and therefore cover a wide range of sizes. While libraries in major teaching hospitals are probably active and financially secure due to the large number of potential customers located nearby, libraries in smaller hospitals are in much more danger of being deemed a non-essential use of financial resources. They are less likely to be used because they have no or fewer medical students, fewer unusual or challenging cases, less or no research, and their doctors are concerned largely with primary patient care. Hospitals are so cost conscious that they may see the library as an easy (though improper) target for expense reduction.

Reference libraries are very much alike and therefore medical librarians should look for ideas particularly in the law and corporate chapters in this handbook.

CUSTOMER DIVERSITY

Medical libraries serve a highly diverse group of customers and therefore there is great need for careful market segmentation (see Chapter 5).

The obvious market segmentation is based on job function and it is similar to that seen in Chapter 14, "Law Libraries," where 383 members of a law firm were divided into nine job categories to aid the tailoring of service to each group. In a hospital the job classification might be:

- staff physicians
- house physicians
- nurses
- pharmacists
- faculty
- administrators
- support staff
- technical personnel
- students
- patients

There may also be research workers, pharmaceutical company personnel, lawyers and others.

As medical librarians quickly learn, each of these groups has different needs and expectations based on such factors as:

- perceived status in the organization
- relation to direct patient care
- level of technical competence
- speed of response needed.

Beyond the rather obvious customer categories there are others that are of great importance in understanding library service requirements.

Health professionals now come from a wider range of economic, ethnic and national backgrounds than they once did. Ethnic diversity is becoming an important factor in planning effective library service.

Such distinctions among customers should come from observation rather than formal surveys since surveys that deal with ethnic background are considered to be in questionable taste.

INFORMATION DISTRIBUTION

The National Library of Medicine (NLM), indexing over 375,000 articles annually, is the basic repository of what physicians call "the literature." Almost universally medical libraries have access to these materials on line, or on CD-ROM. Because there are so many national health care issues, federal funds are available for institutions to incorporate sophisticated information systems that might otherwise not be considered economic. The MEDLARS (Medical Literature Analysis and Retrieval System) family of databases from NLM provide a means for librarians and customers alike to keep up with medical literature without being overwhelmed by it.

Use of MEDLINE and related specialized databases have, over more than twenty years, become an almost inevitable part of medical practice. Through simplified Grateful Med software and Loansome Doc document delivery, the databases come into ever wider use. There are even legal cases that indicate doctors and hospitals might be held liable if they do not use computerized databases.

Support services from NLM, including publications and telephone assistance, are helpful in selling database use. Librarians have been known to say "we know best how to use MEDLARS." Librarians' superior knowledge of search methods becomes a major tool, especially in reaching those medical professionals who are infrequent users of information.

Going well beyond database searching is the Integrated Academic Information Management System or IAIMS. It is being developed under NLM grants at the University of Cincinnati Medical Center and several other locations. IAIMS is the "ultimate" patient-centered biomedical information system which integrates clinical, academic and management information for improved patient care, education, research and quality assurance. It is, in fact, an information system so comprehensive as to be beyond the present reach or need of most hospital librarians. There is, however, plenty of marketing opportunity for librarians working with data systems they actually have available now. The secret is to sell your strengths. Make the strongest case for what is now available or soon will be. Don't worry too much about the distant future.

COMPETITION

Every library must analyze the strengths and weakness of its competition. Competition may come from other libraries, from available database services or in a sense from nonuse of information. Actually the nonusers or infrequent users of information are probably the best source of gain from marketing.

MEDLARS may in a way be the greatest competition the medical libraries see because it encourages use by the individual professional. Grateful Med does indeed put physicians on line in the same way lawyers can work directly with LEXIS or WESTLAW. Promotional material for Grateful Med points out that it can be the only library in small hospitals. Other librarians, however, are holding workshops on the use of Grateful Med by physicians in offices or at home. Once physicians know the benefits of databases they may well become better users of medical libraries. To hold these customers the medical libraries must:

* Prove they can provide more effective databases searches.
* Save time for users.
* Respond quickly.
* Make the interaction with libraries pleasant and professional.

Unfortunately there are still occasional stories of librarians who display a negative attitude or doctors who say about Grateful Med, "that way I never have to go to the library." Service improvements can eliminate that kind of competition.

Service improvements are always required if the library is to remain competitive. Improvements may be individually small but, if continuous, can be important. See Continuous Improvement in Chapter 9. Improvements must be aimed at quality, service, productivity and cost. Underlying most marketing efforts in special libraries is the need to prove that the functions provided are valuable and cost-efficient.

With consistent use by physicians, nurses, pharmacists, students, researchers, etc. the survival of the library should not be at stake. Marketing can impress the importance of the library on institution management while helping to improve services and increase the number of customers.

COLLABORATIONS

Collaboration among libraries and the exchange of materials will continue to be a most important trend in the handling of information. Libraries are no longer known just for their collections but for their access.

Medical libraries have a very high level of access to medical literature through MEDLARS, though they also maintain important collections of bound volumes and serial titles. From a marketing standpoint, collaboration among libraries can make an individual library more useful to its customers. It is an advantage worth exploiting through publicity.

An interesting case of library collaboration and marketing comes from the Northeastern Ohio Universities College of Medicine, known as NEOUCOM in Rootstown, Ohio. It is a joint activity of nearby state universities and so has access to those libraries. Going much further, Jean Sayre, Director and Chief Medical Librarian at NEOUCOM has developed a combination of new product research and library cooperation.

NEOUCOM is a rather new institution, growing up largely in the online age. Students are on site for two years of basic science and then are dispersed to 18 area hospitals for the years of clinical training. Action therefore shifts, in part, to the hospital libraries. The 18 hospital libraries (14 are staffed by a professional) work together to be sure that they are well positioned with students as well as their usual support groups, the physicians and administrators.

NEOUCOM recently improved its service and value by creating an online data service for its physicians, students, and staff. Planning for this new effort began with a survey of physicians. The survey and accompanying papers, including a summary of results are found in Exhibit 15-A. The survey provided an opportunity to gain important knowledge of physicians' types of practice and their use of information resources.

A tabulation of results showed, for example, that about half of responding physicians said they used a personal computer. Of the other half, 67% are constrained in their computer use by the lack of training. Even some of those who claim to be computer users may need training.

Thus Jean Sayre not only developed supporting data for the intended online service but produced ideas for further initiatives such as an apparent need for computer training that libraries can provide. Because this was a collaborative effort among all the NEOUCOM-related hospitals, all the librarians got a chance to see some new directions they might take.

Available systems and equipment change quickly and therefore the NEOUCOM survey, which was developed in 1990 would be revised for current use. But also, note that the survey can easily be revised for non-medical situations. That in fact was done by some libraries that field tested an early draft of this handbook.

SERVING THE GENERAL PUBLIC

Medical libraries are very different in the manner in which they serve the general public. Frequently it is discouraged or prohibited because of the potential for interference with service to professionals. As in so many other issues the libraries must line up with the stated objectives of their institutions. And that can go either for or against service to the public.

In government-funded hospitals and medical schools there may be the feeling that taxpayers can demand access. Independent hospitals may on the other hand feel they owe information access to patients and their families if not the public at large. Or they may find public access helps sell the institution generally.

According to Josephine Yeoh of the D.J. Vincent Medical Library at Riverside Methodist Hospital, Columbus, Ohio, an average of 10 general public customers use their services every day, an increase of approximately 90% in one year. The staff tries to provide personal assistance for these users because they are usually emotionally involved with their research. They have also usually tried unsuccessfully to find the information elsewhere. This service reflects well on the hospital and its dedication to patient care.

Often the response to a question from the public is referral to nearby public libraries. Either a hospital or public library might consider a more self-service approach such as the consumer health database offered by the Medical Data Exchange in Los Altos, California. It is available on CD-ROM or floppy disk and provides text summaries of articles from a wide variety of sources gaited to use by the public. Services of that sort can provide useful, promotable access to an intensely interested market segment. Like any other new service, however, it needs careful advance study.

Another route to the public is through a paid membership library such as the Allen Memorial Library on the campus of Case Western Reserve University in Cleveland. Hundreds of physicians belong and many use it extensively. Among the large institutional membership are 53 hospitals, 19 corporations and 57 law firms. This last category is an active and growing one. Members pay dues, plus fees for some specific services. Allen Library has some 40,000 online data reorder and inter-library loan transactions annually. It is highly valued by members and in a way builds positive support for the university.

THE MARKETING PLAN

All of the needed elements for a marketing plan should be brought together in such a way as to provide goals for success. This chapter and other parts of the workbook provide ideas covering many of the needed elements. Exhibit l-A is a model marketing plan that can be very helpful. While written for a law library it can be modified to suit any library.

Records of usage by category of patron will give the library information about who is now using the facility, how often, and what services or materials are used. The various groups may have rather differing needs and may require varying levels of technical complexity and assistance. Balancing all of the possible customers and still providing a comprehensive service can be difficult. The medical industry is ultimately based on patient care. Thus, the primary purpose of the medical library is to support the education and research needed for patient care.

Information about user groups might influence the priorities of the various patron groups in the library's marketing strategies. An appropriately thorough market definition will also provide information needed for the selling and implementation of the marketing plan. Considering customer schedules (different shifts) and customer perceptions (medical hierarchy) can add to the success of the plan. Marketing is more effective when tailored to the customers' situation, habits and perceptions.

In addition to regular records of library usage by category of customers, there will be need for surveys to fill special needs. Exhibit 15-A, a survey covering a new proposed service was described earlier in this chapter.

Appendix B covers surveys in general and should be useful to medical librarians. While many surveys in this book were developed for other groups, there are three included here that come from medical libraries.

Using data from usage records, various surveys, and other sources the marketing plan can be prepared and put to use. The librarian's professional judgment is always an important ingredient.

A part of the marketing plan will always be the sales tools - newsletters, training sessions, bulletins, articles and other media to promote the library. All of these efforts can communicate the function and success of the library to customers and administrators. Marketing the medical library can be one way in which to inform decision makers of its importance to the mission of the organization. Marketing programs can help medical libraries increase their security by proving their worth, however, they should not be substituted for personal contact, which remains the most effective marketing tool.

Summary: Medical Libraries

* Recognize the many segments of medical library customers in terms of function, status and cultural diversity.

* Be prepared to serve customers in different and appropriate ways.

* Make full use of the database offerings of the National Library of Medicine along with supporting informational material.

* Use newsletters, bulletins, articles, and other media to make sure all possible customers know of the medical library and know how to use it efficiently.

* Constantly review operations to improve productivity, service and quality. Remember that all costs in the medical industry will come under increasing scrutiny.

* Be prepared to serve the general public within the policy guidelines of the organization. Be careful that public usage promotes the interests of the institution but does not interfere with service to core customers.

CHAPTER 16
PUBLIC LIBRARIES

> "Your business is people, and if people don't use the library you will be out of business. Rest assured, people will be moving into the information age with or without libraries."
>
> Fred Goodman, President, Porta-Structures Industries, speaking at the Public Library Association meeting, April 5, 1986

Public libraries must detect the public's need for library services and then attempt to fill these needs. Sometimes the librarian, being the expert, must strike out with ideas and services the public does not yet understand. Drawing that line between responsiveness and innovation is one of the most difficult parts of creative librarianship. This chapter contains quite a variety of ideas and experiences of librarians from around Ohio and elsewhere that can be useful. There are some challenges as well.

PLAN IT

Planning really means selecting from many possibilities exactly what functions the library will carry on and how they will be managed and promoted. Chrysler has a similar problem which they define as running a "lean" organization. They put it this way:

> "Leanness means keeping your efforts integrated and focused. It requires smart choices. You can't water all the flowers. You have to pick the one or two critical messages you must communicate and communicate them well."
>
> Ted Cunningham; Chrysler Executive VP for Sales and Marketing as reported in *Automotive News*, February 3, 1992

Along the same line, library consultant Lowell Martin in the 1982 Bowker Memorial Lecture said that public libraries try to do too much and as a result, find it difficult to provide the quality of services desired. He discussed the many perceived roles of public libraries and stated clearly that each library and community must decide what they wish to accomplish and always work toward those ends.

This observation by Martin underscores the need for planning library service. Put in the context of public libraries the planning process includes:

- Developing a **mission statement**, very broad and general, reflecting the essence of public library service.

- Preparing a **library/community analysis** to obtain a better understanding of the library/community relationship.

- Writing **goals and objectives**, defining a course of action in broad, measurable terms and the specific actions for their accomplishment.

- Creating an overall **strategy** and assign specific tasks to obtain the objectives.

- Evaluating **results** to ensure the achievement of goals.

Note that a critical part of the process is to float a trial balloon here and there to see how the plan looks to some of your customers or a group such as the Friends of the Library.

An excellent guide to planning is Floyd Dickman's Occasional Paper published by the State Library of Ohio and noted in the bibliography. An example of careful planning is found in the five-year plan completed by Westerville [Ohio] Public Library in 1991. It, too, is listed in the bibliography.

MEASURING INPUT, OUTPUT & PRODUCTIVITY

A part of the future planning process or self-assessment (see Chapter 4) is to measure what is going on now. That requires a look at the input of resources and the output of services from the organization.

Input

Input of public financial resources comes largely from the state level in Ohio with some local supplements. Other states have many other patterns. Income from non-public sources such as special fees, Friends of the Library and gifts are often important. All these sources should be tabulated for the past few years and projected for the next three years on as realistic and hard-nosed a basis as possible -- a difficult job.

So much for input. Now we move on to measures of output or accomplishment.

Output

Many libraries are already using the suggestions contained in *Output Measures for Public Libraries*, 2nd ed. It is a manual of standardized procedures to help in measuring performance in terms of library services (outputs) rather than library resources (inputs) and complements another American Library Association publication, *Planning and Role Setting for Public Libraries*. Output measures are widely applicable, relatively easy to use, comparable across libraries and easily interpreted by the community.

Measurement of output serves a variety of purposes such as:

- assessing current performance
- diagnosing problem areas
- providing information for planning and evaluation
- describing library performance to people and organizations outside the library (local government, state library agency, the public, etc.) . . .
- justifying resource allocations

Of the measures discussed in the manual, most useful to the task are:

- annual library visits per capita (reflects library's walk-in use)
- in-library materials use (reflects number of materials of all types used within library)
- turnover rate (reflects intensity of use of the collection)
- title fill rate (proportion of specific titles sought that were found during user's visit)
- subject/author fill rate (proportion of searches for materials on a subject or by author that were filled during visit)
- document delivery (measures time that a user waits for materials not immediately available - a percent of requests filled within 7, 14, 30 or over 30 days).
- reference transactions per capita
- reference completion rate (staff estimate of the proportion of reference questions asked that were completed on the day asked).

Included in ALA's output manual is clear information on how to collect, analyze and interpret the data. It is important to know what the data mean and what to do about them.

Standards for Public Library Services in Ohio, published in 1986 by the Ohio Library Association in cooperation with the Ohio Library Trustee Association and the State Library of Ohio, and the *Measurement Manual* (1987) incorporate selected output measures from the ALA manual and refer the reader to the procedures described in implementing these measures.

An important use of output measures is writing measurable objectives and monitoring library performance.

Productivity

Input and output must be combined in some way so as to measure productivity. Virtually every kind of organization public or private is called upon to constantly improve productivity - the number of units produced compared with the input in dollars or staff hours. Libraries must make regular productivity improvements and be prepared to show them to legislatures or other sources of financial support. Fortunately there have been many improved methods of library operation available and widely adopted under the general heading of automation. There is much more to come in the way of operation improvements and more convenient ways of getting and storing data. Further, the idea of continuous improvement, described in Chapter 9, is to provide a flow of small, regular measures in productivity and quality.

In order to measure output and therefore productivity, libraries need more uniform means of measuring:

1. Reference transactions with librarian help.
2. Reference transactions without librarian help.
3. Electronic reference transactions including dial-in.

THE LIBRARY INDUSTRY

Every planning and marketing effort must be carried out with an eye on the industry within which the organization must operate. Public libraries are an important industry of about $4.1 billion in operating expenditures and 108,000 full-time equivalent staff. These are 1990 figures from a federal government report quoted in *Library Journal*.

Wise marketing-oriented librarians regularly watch these figures for trends that will help them understand changes within their industry.

For example, data show that the number of published book titles has declined rather sharply. Whether this is because of recession or is a more fundamental trend such as a shift to electronic media is not clear. Here are the numbers:

American Book Title Production
All Hard and Paperback

1987	56,027 (record year)
1988	55,483
1989	53,446
1990	46,738
1991	47,000 (preliminary)

Source: *Publishers Weekly*, Adapted from issue of April 6, 1992

Total value of all books sold is still rising even though the number of titles is down. Average prices continue to climb.

Industry data such as this is widely available through *Publishers Weekly*, and other sources and should be on the regular study schedule of library directors and managers. Implications for the future clearly include matters of collection size, space needs and changing habits of the book-using public.

Of more parochial interest are the regular performance statistics for each library, such as circulation and reference transactions. They are fundamental measures of trends and individual performance and deserve careful, regular attention.

Many states publish detailed figures on public libraries which are used by librarians to see how they stack up. For example these numbers are available in the excellent annual *Statistics of Ohio Libraries*, published by the State Library of Ohio. Statewide totals of Ohio public library circulation for 1985-1991 are in Exhibit 4-D. A review of this exhibit shows:

1. Ohio libraries have a strong, positive trend with circulation up for every year of the last six.
2. The rate of circulation growth has increased from 4.9% in 1986 to 8.7% in 1991.
3. Audio-visual has contributed heavily to growth since it was only 3.5% of the total in 1985 and is nearly 16% in 1991.

Public libraries ought to have uniform statistics on the volume of reference transactions so as to promote the kind of comparison that can be made statewide in circulation, expenditures and personnel. Part of this is the need for improved measures of reference and information service, whether it be the use of electronic data or hard copy.

SURVEYS OF CUSTOMERS

Throughout this handbook there are many suggestions on surveys - their importance and their application to libraries. Chapter 6, "Product Planning," contains the first reference and includes a tabulation of many survey types (Figure 6-A) with the attributes of each.

Several chapters on the types of special libraries - law, medical, etc. have examples of surveys that have been used successfully. Most of these can be modified for public library use. Finally Appendix A, "Surveys to Gather Marketing Information," includes narrative and samples of surveys used in public libraries and elsewhere.

Surveys are important and should be used frequently. One of the benefits of surveys is that they can uncover small market segments that may be worth serving. These are the familiar "niche markets" much discussed in industry. They are the subject of the next part of this chapter.

NICHE MARKETS

Niche marketing has been a popular topic in the 1980's and 90's because it is a recognition that America is a collection of thousands of individual markets. Public libraries are constantly looking for small viable products that are valuable by themselves and help build usage and support for the whole organization.

Genealogy & Local History

Searching for an example of reaching a specific market, the authors were rewarded with a submission by Julie M. Overton of Greene County Public Library (Ohio). It is a case of niche marketing because it doesn't fit all situations, but can be very appealing where it does fit. Greene County may have a special feeling about history because the city of Xenia was nearly destroyed by the great tornado of 1974.

Genealogy/Local history is a marketing issue because it can build important friendships. Julie Overton's experience suggests that those who use history resources may become strong supporters of the library in other ways.

Exhibit 16-A is a summary of Greene County's program with many suggestions.

Documents

Some public libraries and university libraries have long been designated as federal depository libraries due to the tremendous output of government publications that they automatically receive free of charge. Some libraries are complete depositories (receiving all government publications) and some are selected, choosing the material that will best serve their customers. The profile of what is selected can be changed annually if necessary. This topic is also mentioned in Chapter 10, "Academic Libraries."

Periodic inspections by the Government Printing Office are intended to insure performance standards at each depository. An examination of Ohio Wesleyan University's Government Publications Department gave rise to a finding that there should be more "outreach to the community," which is Governmentese for promotion and marketing.

Not only is there recognition from the public and librarians themselves that more must be done to initiate public awareness of libraries, but now there is also recognition from high-ranking divisions in the government. In a renewed emphasis the federal government has recognized a deficiency in effective library marketing. Consequently, there is increasing pressure on libraries to promote public service in accessing government information.

The availability of these documents through federal depository libraries enhances the democratic notion of an open society, providing free access to government information. Apparently, in this context a finding of inadequate "outreach" was filed against many depository libraries who had not previously been cited.

At Ohio Wesleyan University in Delaware, Ohio, Julianne R. Houston, Government Publications Manager at L.A. Beeghly Library has developed a proactive approach through a Public Awareness/Community marketing plan, that can enlighten library personnel about planning and implementing an outreach plan. Exhibit 16-B is a copy of that plan.

PUBLIC RELATIONS

This handbook treats public relations as a part of the marketing process.

Chapter 8, "Selling," discusses both public relations and advertising. In the bibliography there are several specific public relations items, such as the books by Corette N. Kies and Rita Kohn and Krysta Tepper. In several of the other listings there is at least a section on public relations.

Since most public libraries are knowledgeable about public relations, and active practitioners, this handbook does not try to cover the subject extensively. There are two points to remember about public relations:

1. Be sure that public relations activity makes sense within the scope of the prepared marketing plan.
2. Do it.

ADJUSTING TO NEW TECHNOLOGIES

Chapter 9, "Closing the Loop," touches the question of new information technology and what it may offer. Some technology will be very helpful, others competitive in the sense that they can be made available directly to the office or home PC without the intervention of libraries. Determining how to use these new technologies will continue to be a supreme marketing and intellectual challenge.

One example of a new technology grew out of a statement made by Librarian of Congress James Billington, that "It's time to get the material out," meaning that somehow, parts of LC's 100 million pieces of material should become more easily accessible.

To "get the material out," the Library has in prototype *The American Memory* - a means of making documents, photographs, art, and sound recordings widely available on multi-media equipment around the country. There could be an "American Memory" room now in libraries, and the material might be available online at the home PC.

By this means it is possible, for example, to hear a sound recording of Franklin D. Roosevelt making a speech about peace shortly after World War I while seeing the text on screen. While the capabilities of the system are impressive, usage during recent field tests has not been great.

Public libraries will have a continuing need to evaluate new technology and it is beyond the scope of this book to attempt to give any hard advice on the subject. However, because it is part of the continuous circular marketing process, some further points on technology are included in Chapter 9, "Closing the Loop."

Summary: Public Libraries

* Follow the planning process with its emphasis on mission, goals, strategies, and measurable results.

* Measure resources put into the organization and product output as carefully as possible. This will make it possible to track productivity.

* Productively must constantly be improved.

* Keep up with all the data and industry trends that can influence the world of libraries and information centers.

* Survey, survey, survey. Ask users and nonusers what they need, want, or will use.

* Watch for market niches to help build the customer base.

* Be prepared to appraise and adjust to new information technologies.

CHAPTER 17
SCHOOL LIBRARIES/MEDIA CENTERS

Four primary factors relating to marketing school library services are:

1. School libraries or media centers rarely, if ever, generate any income. Therefore, marketing functions focus entirely on developing an appropriate collection and promoting its optimum, and frequent, use by students and teachers. The connection between services rendered and budget is tenuous.

2. The identities of clients of school libraries are usually individually known. They are the teachers, students, and sometimes administrators of the school or the district.

3. The subject area requirements for school libraries can be quite accurately predicted because they serve the specified curriculum of the school. There may be variations in the type of media preferred and in recreational library use, but the subject coverage is delineated in some detail.

4. Information services in most school libraries are limited to bibliographic and research instruction, manual catalog searches, and assistance from librarians to individual teachers and students. Some libraries have access to CD-ROM data disks and computer terminals. Relatively few school libraries have computerized catalogs or online database access, although more will gain these important tools.

School librarians, who may prefer to be called media or instructional materials specialists, appear to be among the most pro-active and energetic of librarians. The most effective ones seem to spend a great deal of time outside the library itself. They are in classrooms, the teachers' lounge and lunch room, and in the halls, delivering materials and talking with everyone.

This chapter will concentrate on the needs of teachers as the primary customers of the media center. Librarians generally consider the students as their real clients, but most of their work is with teachers, as a means of getting to the students. They think of themselves as an extension of the teaching process, and work hard to keep up with the school curriculum and the teachers' lesson plans. They try to find the best materials to supplement the schools' textbooks, and then actively "sell" their wares to the teachers.

They try to make the library (or media or instructional materials center) accessible, useful, and hospitable to the students, by securing materials that are geared to their interests as well as to their assignments. Many of them

teach classes in use of the library and in research techniques, but also in topics of special interest to students. The most pro-active librarians don't wait for teachers to come to them; they reach out to offer their services.

School librarians seek information about new materials and new ways of engaging teachers and students in their use. They network extensively and devour professional journals, publishers' information, and announcements of new non-print media. They forward information to teachers for help in making selections as well as to stimulate use of those purchased.

They cooperate extensively with other media resources in their communities. For example, Don Barlow, director, says the Westerville Ohio Public Library sends 60,000 books a year to the local public schools on interlibrary loan, with daily delivery. It is a school district public library and therefore meeting school needs makes good political sense too.

PREPARING THE MARKETING PROGRAM

Some librarians report that aggressive "marketing" of their services has resulted in better recognition of the value of the library in the educational process. This helps them to survive and keep purchasing new materials in the face of retrenchments.

Analyze Your Resources

The content of the instructional material needs to be analyzed as to the curriculum areas and age groups for which it is suitable. Quality assessment is equally important. The librarian needs to know if materials are accurate; up-to-date; free of sexual, racial, class, or religious bias; engaging for students; and in good condition. Informal evaluation can be conducted at staff meetings or lunch and coffee breaks, information can be collected from teachers and students following use of the materials, or formal surveys can be sent out. A systematic review helps keep the collection most useful to teachers and students. Exhibit 17-A is a sample form which may be used by librarians or teachers for reviewing materials.

Some librarians formally survey school faculty, asking about their use of services and resource currently available, those they would like to have available, and other suggestions for improvement of the library. Others have small group meetings by grade or by subject department, for the same purpose. Often such customer surveys produce new insights into customers' knowledge of the library as well as of their needs. Done properly, this process serves as a marketing tool as well as a source of information.

Resource-based instruction (RBI) is the goal of many librarians — the freeing of instruction from reliance solely on a textbook. The goal of RBI, also known as Resource-based Teaching/Learning, is to provide instruction in many media to suit the learning styles of all kinds of students. A second reason for using non-textbook materials is the information explosion, which obsoletes many textbooks before they are out of use. Periodicals, databases on CD-ROM, and videotapes may be much more current. Thirdly, students of today are accustomed to nonprint media and modern technology. They prefer getting information via computer or VCR, for example. One librarian reported that use of the catalog increased tremendously when it was automated, because it was so much more convenient for students. Exhibit 17-B contains more detailed discussion of the resource-based way of doing things. It includes a special annotated bibliography.

Know the Curriculum

The media specialist has a good opportunity to learn precisely what it is that his or her clientele will be dealing with over the course of a school year. The district's curriculum guides are the usual starting place. An analysis of what resources the library has to support each curriculum area should be done on a periodic basis. In some districts where this follows the curriculum review cycle, teacher task forces are asked to review instructional materials as the textbook review is taking place. The goal of the active librarian is to know the curriculum "backwards and forwards."

Knowing individual teachers' application of the curriculum is essential, as well. Teacher lesson or unit plans may be reviewed for information about the areas of emphasis, or activities planned to support the instruction. Informal conversations with teachers can elicit information about planned units or activities. Active librarians are always on the alert for information about what is taking place in the classrooms of their schools.

Keep up with the Possibilities

Educational technology is the big push for librarians today. They need to take control of the information services and the mechanical devices that deliver these systems. Historically, the media services (as opposed to librarians) had control of computers, because the first computer courses focused on how computers worked and on programming. Many school districts hired computer specialists to teach programming and computer use. It is up to librarians to make the case that computers are deliverers of information, and information is the library's business. "The technicians can't, the media people can't, and the computer specialists can't. If it's going to get done, librarians have to do it," said one. He reported that the most recent levy election was passed on the basis of technology, not on class size, teachers salaries, or other issues. This, he said, is the wave of the future. Librarians need to showcase this for parents as well as teachers. The parents vote.

Librarians can take leadership roles in the development of plans for new buildings and building renovation, ensuring that provisions be made for fiber optic networks and placement and availability of computers, TV facilities (distance learning is increasingly interesting to many school districts), etc. Planning for automation of the library is also essential in any proposed remodeling or new building. Students increasingly need to be competent in the use of high technology whether they will continue into higher education or go into employment.

Most librarians work extremely hard at keeping up with new publications and non-print media, as well as the newest in technologies. They read library journals and publishers' releases, attend conferences and workshops and haunt their exhibition areas, and talk frequently with their professional colleagues.

One high school librarian reported that she rarely buys books any more, except for basic reference (e.g. Shakespeare's works), because they become outdated too quickly. She buys periodicals and computer data disks instead. In her district, the computerized catalog system also includes checkout and record-keeping, saving a great deal of professional time and maintaining a high level of service in the face of staff cutbacks.

Involve Teachers in Selecting New Materials

When teachers are involved in selection of instructional materials, the choices are more likely to be appropriate to the students and the curriculum of the school, and the teachers are more likely to use what they have helped select. Teachers will be more likely to make library assignments and students less likely to use the facility only as a study hall. Exhibit 17-C illustrates one straightforward approach to gathering material requirements from teachers. Speed and timing are essential in this process, so that teachers can get the materials they want when they want them.

One media specialist forms teacher task forces during the curriculum textbook review cycle, to review possible acquisitions of other instructional materials, and recommend purchases. Active librarians circulate publishers releases as soon as they come out, to teachers who might have an interest in them; opinions are solicited. If a teacher mentions an author whose works are useful, the librarian might buy the rest of a series by that author.

Involve Students in Selection

Although emphasis here is on teachers' needs, students have extracurricular reasons for using the media center. If one goal of the librarian is to increase overall student usage of the library, student input into material selection will be an important factor. One librarian reported that recreational library use increased when she sought student input into magazine selection. Most librarians keep track of which materials are popular with students, and make purchasing decisions accordingly. Further, students can be asked if there are things they'd like to see in the library; request forms can be laid out in a prominent place; suggestion boxes or a bulletin board suggestion sheet can be made available.

SELLING THE MATERIALS & SERVICES

Once the basics of a marketing program have been established, attention shifts to selling. There is an endless list of strategies that can help in this important function and are covered in the following paragraphs.

Be Present

Active librarians are very much in evidence all over the school. They make a point of delivering materials to the classrooms, so that teachers and students are aware of them and what they do. They listen at staff meetings and informal gatherings for indications that they might be of service. They carry books and other materials to gatherings and hand them out for review. "The teachers don't know what they want unless you tell them what you have."

Getting to know the teachers as individuals permits the librarian to tailor services to them. S/he will know which teachers are likely to use which services or materials. Some librarians make a habit of "touching base" weekly with each teacher. As mentioned above, surveying teachers is a way of getting to know needs as well as publicizing the library.

Be Specific

Active librarians target specific materials for the specific teachers (or student groups) who might best use them. They don't wait for requests, but send materials out when they know a particular unit is about to be taught (e.g., the rainforest, ancient Rome). They try to "hit the right person with the right thing at the right time." They try to meet whatever need a teacher may have, with more than one specific suggestion. A result

of this attention is that teachers recommend books to be purchased, helping the librarian with the screening process.

Be Willing to Work

"You can have all the services in the world, but you've got to be out there making things better for the people you work with," is the word from several librarians.

Active librarians are willing to work with any teacher on any project or problem. One high school librarian was the catalyst for an all-school project on the Civil War. The social studies teachers assigned research reports and they and the English teachers graded them. The home economics classes made hardtack and coffee; the art classes, flags; and the woodshop, guns. Local museums and the public library cooperated. "Now the language and English teachers want to do a Renaissance festival," she said.

Some librarians teach classes, not only in bibliographic and research skills, but classes on topics supporting the curriculum. In the school mentioned above, the librarian taught about women's roles in the Civil War. Many librarians know more about computers and software than administrators do. They volunteer to serve on committees dealing with the selection of computers for instruction, so that they can push for information services for the library as instructional tools. They can offer the library as the ideal place to teach both teachers and students about computer use.

Make the Library User-Friendly

One librarian said that there were no signs in the library when she arrived. Now there are signs everywhere, so that users can find things quickly and easily. Automated catalogs increase student usage; so do helpful librarians.

Some librarians conduct yearly in-service presentations to show all new media materials to teachers. They conduct special training for teachers and students in new technologies, such as laser videodiscs, CD-ROM, and online databases.

Be Enthusiastic

A librarian who is enthusiastic about what teachers are doing, and about the instructional materials available, is more likely to "sell" the latter. One librarian, who comes from an elementary school background, uses a great deal of positive reinforcement of teachers, putting congratulatory notes in their boxes when they have done good things with students. Another said his idea of "a good library is one with nothing on the shelves, because everything is in use". He carries new things to every gathering, and tries not to take anything back to the library. To keep teachers aware of library services and resources, one librarian sends out weekly E-mail announcements about the library. Occasional "freebies" are offered in these notices, to encourage teachers to read the messages.

Set Standards

One librarian pledges to get an answer within 24 hours to anyone's research question or request for materials. "When teachers saw that I did what they needed within 24 hours, they came back for more."

In one school, the library had been a "dumping ground for problem students." The new librarian asks each student, "Why are you here, what do you need, and how can I help you?" If the student can't answer any of

those questions, s/he is sent back to class. Orientation sessions focus on the reasons student might use the library. "Now the purpose of the library has been turned around, and more students are using it, and using it for for instructional and recreational purposes."

Librarians have more demands upon their time than they can possibly comply with. Therefore, they must set standards and priorities for determining which activities are most productive and worthwhile. A state media specialist said, "We've got to decrease the things we do that are peripheral to the school's instructional program and dramatically increase those that are integral to it."

Cooperate with Other Facilities

The most active librarians take all the help they can get, wherever they can get it. They encourage teachers to notify them and the public library of research assignments given, so that both can prepare to assist students. They cooperate in summer reading programs, encourage students and their parents to secure public library cards, assist in planning tours and encourage instruction by public librarians in the use of technologies or systems different from the school's. They make extensive use of interlibrary loans. They use the resources of historical societies or sites, museums and art galleries. Their goal is to expand the range of possibilities of instruction for every student.

One example of cooperation between the public library and school media specialists involves extending the hours the public library is open during crucial study periods like exam week. Staying open later each evening and on weekends (perhaps even designating an area for student studying) can help the public library reach young adults while enhancing the academic performance of the school.

Blow Your Own Horn

Making the library an integral part of the instructional process in the school can make teaching more effective and learning more interesting. Making school administration aware of the role the library plays can make a difference in times of budget cutbacks. It is important to the future of school libraries that they not only be, but also be perceived as, central to the curriculum, rather than as a mere service function. This is the concept of resource-based teaching/learning instruction. The librarian who provides active, direct service to teachers can become a partner in the instructional process.

One librarian calls her centrally-located library "the crossroads of the school." She makes sure that people know about the interesting things she is providing for teachers and students. "We just have to break away from the stereotypical picture of the librarian." She credits her public relations efforts for a small budget increase for her library in a time of extensive cutting.

Another librarian pointed out that information is changing so rapidly, the textbook is being outdated, as are books in the library. Periodicals, computer databases and other media can provide updated information. This makes the library more important than ever, and it is the job of the librarian to find allies among the teachers and make this clear to administration.

In an area as fast-changing as information services, all of the steps indicated above are actually parts of a continuous process. There is a continuing need for librarians to be alert to changing needs of students and faculty, and new products and technologies. The steps in the marketing

process are not something a library goes through once every few years. Once the principles are understood, in an effective program, self-assessment, market definition, product planning, product creation (or selection), and selling are taking place all at once and all of the time.

Summary: School Libraries/Media Centers

* Analyze your resources.

* Think in terms of resource-based instruction.

* Know the curriculum.

* Keep up with the possibilities.

* Involve teachers (and students) in selecting new materials.

* In selling,

  Be present, and in evidence.
  Be specific.
  Be willing to work.
  Make the library user-friendly.
  Be enthusiastic.
  Set standards.
  Cooperate with other facilities.
  Blow your own horn.

* Keep recycling through the marketing process.

INFLUENCE OF TECHNOLOGY ON LIBRARY SERVICE

Should a handbook on marketing library services be concerned with modern technology? While that may seem to some a rhetorical question, there are librarians hesitant to fully accept how critical the effective use of technology will be for satisfying the information needs of their customers. In fact, technology has the real potential to change the very nature of libraries and information science.

NATURE OF LIBRARIES

Libraries traditionally have been known for their collections and for the scholarly abilities of their librarians. The objectives were to gather, organize, and protect those collections, while providing customers with guidance.

Few libraries today operate solely within their own walls. Technology provides the means of connecting and combining whole networks of libraries and their collections. Each local collection becomes relatively less important and the *access* a library provides to the universe of information becomes more crucial. The librarian's ability to navigate that universe, to distill and organize information to meet a customer's needs will determine the library's future success.

Today many libraries have online access to a growing hierarchy of information. The forms of information available include not just text, but images, audio, video and graphics. The capability to logically connect all of these into an electronic or "virtual" book has led many library and information specialists to question whether the traditional book will survive as a primary resource. Will the traditional library become museum-like, or do those books possess qualities that guarantee future demand for them?

Book lovers do not like to consider the demise of the book, but for nearly 500 years after Gutenberg, virtually nothing changed in the way information was transmitted. Suddenly, everything has changed. The printing and distributing of books in the traditional manner has already lost many battles to new technologies. Few expect books, not just existing ones but those not yet printed, to vanish. But any library that fails to acknowledge and react to what is happening to library and information science will certainly become less competitive in the marketplace. Worse, before customers are hurt by a library's inaction, they will probably find alternate information sources.

TECHNOLOGICAL ADVANCES

In just the past three decades, the revolutionary advances in computers, communications, storage technology and new media have led to performance gains of several orders of magnitude. No end to this phenomenon is in sight.

Having the computer capacity to perform more complex tasks in less time leads to greater expectations on the part of computer users. No longer content with knowing where a title is held, we now want the computer to provide an abstract of the material. In fact, we would prefer an electronic copy of the full text. And the wish list grows: we want additional keyword searches within the text, we want references and access to related materials. For example, while reading about a Mozart symphony, why not have the score available, and why not hear the music being played concurrently.

What new technologies can we realistically expect within the next decade, and how can libraries prepare for them? Even smaller libraries have implemented systems for circulation and collection access, replacing card catalogs along the way. Customers were often less than enthusiastic when that happened, and we should learn from that. CD-ROM devices have spawned a new industry providing rapid access to specialized data bases, at a relatively low cost. Commercial information services provide access to current consumer, business and technical information that in the past would have been inaccessible within any reasonable timeframe.

The next decade will bring a growing array of information services, based on advances in hardware, software and communications. Anyone with a personal computer will be able to utilize new generations of storage devices, logically-linked multimedia presentations, and a proliferation of online services. They will include new applications that may incorporate:

- Audio functions to provide music, voice recognition, synthesized speech, and recorded sounds.

- Images of manuscripts, documents, pictures and archived books, perhaps too fragile for circulation, but still valuable visually in their original format.

- Logical combinations of information retrieved from different databases, selected, sorted and presented in reports and graphs, all accomplished using functions available on a personal computer.

- Full motion video, allowing access to current events, films and educational packages, available for immediate viewing and integrated with text, voice, data and images.

SURVIVAL TACTICS

While the rush of technology can appear overwhelming, there are several tactics a library staff can use to keep abreast of developments and to apply appropriate technical solutions to their customers' needs. They are tied to integrating an ongoing marketing program into the library's operation.

Update customers' requirements whenever they change, not just once or twice a year. That implies, of course, continuous communications among library staff and customer contacts, the feedback required to close the loop in the marketing process. Modifying and clarifying what your customers want will help you evaluate new technology in terms of the solutions it can provide.

Do not wait for technology to come to you. Allocate staff time for ongoing research to discover and evaluate equipment and software that are available, or will be in the near future. Talk to vendors who can provide information essential for a complete analysis. Recognize that vendors are biased, so look for multiple sources of information.

Attend meetings of library organizations that address library technology as part of their agenda. Experiences of other libraries will speed your own learning curve. Conferences provide opportunities for peer and vendor contacts.

Technology brings with it a whole new jargon. Keeping up with new concepts and terms will be easier if you stay somewhat current. Ignore developments for a year and you may feel like a novice again.

Through all of this, keep focused on the objective of customer service. Understanding technology for its own sake may be appealing, but it will not translate automatically into marketing solutions.

SURVEYS TO GATHER MARKETING INFORMATION

Since customer surveys are broadly used by libraries they appear in many parts of the handbook. This appendix contains further description of several kinds of surveys particularly as they apply to public libraries. Before going through this appendix please go back and review Chapter 6 where surveys are handled in some detail as part of Product Planning. Note also the several references in the bibliography where there are detailed treatments of surveys.

The rest of this appendix consists of:

- Descriptions of several specific surveys
- A selection of sample surveys.

The sample surveys are referred to in this appendix or elsewhere in the handbook. They are arranged so that they can be copied directly from the book. They may be used exactly as they appear or they may be changed to meet individual needs.

SURVEY BY TELEPHONE

Cleveland Heights-University Heights Public Library (Ohio) used the telephone in a 1987 survey covering a sample of households in the area. Telephone surveys are well suited to large or small libraries and can be carried out quarterly.

Members of the Board of Trustees and the administrative staff agreed that, in spite of the heavy use of the library borne out by exceedingly high circulation and attendance, plus the volume of reference questions asked, there still were needs not being met and that knowledge of community attitudes about the library could be helpful in reaching out and responding to the unmet needs.

A random telephone survey was selected as a method of sampling the community to ascertain the library usage of the telephone respondent and that of other family members, in addition to identifying attitudes toward the library staff and toward the contributions the library makes to the community. A copy of the survey form is included as Exhibit 6-B. Note that it has been made generic by removing the library's name in case others wish to use it.

The study was conducted by the Cleveland State University College of Education. The survey questions and sampling plan of 300 households were developed in collaboration with the staff and Board. The survey was conducted independent of the library staff with trained data collectors.

Results overall:

- 99% of the respondents felt that the library was a worthwhile investment of public funds. (Soon after the survey a property tax levy to support the library passed with a 70% plurality.)

- 29% made suggestions for improvement.

What was learned?

- Demographic profiles of library users - by educational level, by occupation, by services used, by branch used.

- Perceived needs - information ranked third, behind book withdrawal and browsing in the library. Useful comments and attitudes on the online catalog. The need for focused training of these users became very apparent.

- Comments for improvements mostly concerned hours of opening, parking, physical layout, easier computerized operations, additional staff.

- Specific requests for materials (books, videos, periodicals) by type of respondent and by building.

Action Taken

- Staff considered every suggestion and acted upon those that had substantial appeal or that pointed out an obvious lack.

The survey results showed that at the time there was strong public support of the library and it pointed out specific areas needing attention. Community support both in use and in public attitude was apparent and provided a level of confidence for the Board and staff.

IN-HOUSE SURVEYS

The Free Library of Philadelphia conducted a system-wide survey of customers as they exited the library. An encouraging 72% agreed to answer questions. They were asked why they visited the library, what services they used as well as how they rated services and facilities. Demographic information was also requested. The result of this in-depth survey was the development of a long-range service plan entitled, "When They Turn to Us: Serving Diversity, 1992-1996."

The very useful final survey report listed in the bibliography, covers all aspects of the survey: purpose, methodology, questionnaire, etc.

In another example, the Dayton & Montgomery County Public Library in Ohio runs regular in-house surveys (see Exhibit APB-A) to learn what the library does well and to gather criticisms. Twice yearly, survey forms are handed out to patrons at the main library and at branches at the same time and day. Some branches get more response than others and some weighting is used when results are accumulated for the whole system. Branch results are also read carefully to detect any "hot spots," either pro or con, according to Mark Willis of DMCPL.

Over the years these semiannual surveys have been uniformly very favorable and with little change (there is a natural prolibrary bias among users) so that once-a-year surveys may be enough. Special surveys can always be worked up quickly. More needs to be discovered about nonusers.

PERSONAL INTERVIEWS

On some occasions it can be important to meet directly with a particular interview group to ensure they speak freely. There may be a status issue as well. Some important subjects might not respond unless reached personally by the interviewer.

Such a case was the special Dayton survey consisting of personal interviews with 14 community leaders: media people, educators, city officials, and human services professionals. These interviews were intended to gain insight into the community leadership's perception of the library: its services, strengths and weaknesses. Those to be interviewed received in advance a fact sheet about the library and a list of questions to be used in the interview. All interviews were conducted not by library people but by a local public relations firm under contract.

The responses of these leaders were extremely positive, but indicated a stereotyped view of libraries.

Largely, the responses reflected the generalized good feelings most people have always had toward libraries. Aside from some compliments about telephone reference, there were no indications that these people understood that the library is a major information source of real importance to the county.

Suggestions made during the interviews were of a very familiar sort: allow telephone renewal of books, provide baby-sitting service, etc. While these are all worthy suggestions, no respondent talked about data banks, inter-library loan and other more demanding elements of a modern library/information center. And this was so even though DMCPL is advanced in many of these special offerings. DMCPL's disappointing experience could be replicated in most parts of the country. The story of the modern library and its information capabilities must be told!

COMPARING USERS AND NONUSERS

A continuous and perplexing problem for library marketers is to find who is and who isn't using the facilities. And why or why not.

Using the Public Library in the Computer Age, a study authored by Westin and Finger, describes measurements of many elements of library activity, starting with the estimate that 66% of the population are users. The study is from 1991 and says the percentage of users is 15% above a similar but not identical study in 1978.

Whatever national studies show, an individual library is interested in:

1. What are the characteristics of users?
2. What are the characteristics of nonusers?
3. What moves people from one group to the other?

Much of the marketing effort will be aimed at these three questions and their relation to community demographic information that must also be obtained.

The Honorable John Dolibois, a Lane Public Library Trustee, shared information from a survey designed and conducted by a consultant.

Lane Public Library, serving the Hamilton and Oxford, Ohio area carried out an extensive mail survey in 1991 aimed at both users and nonusers. It was a two-part research program designed to gather reliable, representative and accurate information from a sample of residents living in the library service area and from a group of library users. The questionnaires (different in content) were mailed to randomly selected number of both groups. Twenty percent of the community surveys were returned and 30% from patrons were returned. Postage paid return envelopes were provided.

Twenty-four questions were included in the community survey and a lengthy sixty-four questions in the patron survey. The resident survey dealt with questions of demographics, why or why not the library was used, the services/programs used and the primary role of the library. The patron questionnaire covered some of the same ground and also asked why the library was used, level of satisfaction with the library, rating of job done by the library, and detailed questions about the staff and services.

Users perceived the primary role of the library to "support the school curriculum" followed by "developing a collection primarily for recreational reading". Both groups saw the library as a business research center but that was not clearly defined. When patrons were asked why they came in, "personal information needs" and "research projects" placed near the top of the list, indicating that adult information services were a major draw.

It requires extensive cross tabulations, which were not available, to begin to see how users and nonusers differ. It appears that families of school age children are more likely to be users and a factor of convenience or geography showed in the results.

Nonusers put the catch-all phrase "too busy to read" at the top of their list with other items as follows:

Reasons for Not Using Library	*% of Respondents*
Too busy to read	57.2
Unable to find what I wanted	22.5
Lack of parking	13.0
Library computer too difficult	9.7
I buy the books I read	9.3

There are clues for action here, but more is needed, perhaps through some follow-up work. The key is to identify the library's attractions and its barriers to usage. Computer technology is a barrier to some and attraction to others. Looking at both the Lane Library data and national figures cited from the Westin-Finger study (noted in the bibliography) it might be said the attractions outweigh the barrier aspects of computer technology. But both are constantly changing.

SHORT, INFORMAL SURVEY

Some libraries provide short, narrowly-targeted questionnaires on a regular basis. Stephen Wood of Cleveland Heights-University Heights Ohio Public Library has used one which is Exhibit APB-B. It comes from *Output Measures for Public Libraries* and is one of many useful forms available in that source.

This survey may be used quarterly, semi-annually or annually. Stacks of forms are placed throughout the adult reference department on shelves, on tables, at the catalog. Collection boxes are marked.

Data gathered is studied for possible additions to the collection or needed duplication of titles. Incidental information on reasons for the library visit other than specific information or books is tabulated for trends.

SURVEYING/ PLANNING

In planning the survey it is critical to know what information is needed so that questions and answers will reflect that. Further, it is equally important to be prepared to answer responses generated by the survey. This can be done either by the individual concern or a general response to the survey results, thus building confidence in the library.

Surveying, long-range planning and marketing are all of a package with one leading into the other. Much of what goes into a long-range plan which is a familiar topic among librarians, ties nicely into marketing. Don Barlow, director at the Westerville Ohio Public Library, had long-range planning in mind when they prepared the survey form which is included as Exhibit APB-C.

Copies of the survey were handed out at the library and it appeared in the local newspaper with an article urging the general public to participate. Exhibit APB-C has been photographically reduced from its original newspaper size of 11x17 inches.

A searching questionnaire was circulated among the staff at about the same time. On every one of its nine pages, the staff was asked for opinions and recommendations on nearly every imaginable issue. There were questions on reference service, a particularly active function at Westerville.

With help from survey results, and a great many other sources a comprehensive long-range plan was developed and put to use. It is cited in the bibliography and is well worth careful study.

FOCUS GROUPS

Most librarians are aware of focus groups, a technique often used to uncover issues or attitudes that can be investigated in later research. Focus groups rarely settle anything because their coverage is so small. Six to ten people can't be equated to the multitudes that flock daily into public libraries, but focus groups can give some good general leads on opinions and attitudes.

One very specific use of focus groups comes from Don Burrier of the Elyria Public Library in Ohio. Six focus groups were set up with 12 people in each. The main discussions were on what participants liked about EPL and what services and materials should be changed or added. Results were then incorporated into the library's three-year plan.

A "how to" on focus groups is set up by itself as Exhibit 6-A.

OTHER PEOPLE'S SURVEYS

There is a continuing flow of survey material about America and Americans and some of it can be valuable to librarians as they constantly adjust themselves to changes in the society. In the bibliography there are three published examples that are interesting, provocative and amusing.

1. Harvard faculty member Juliet B. Schor has published *The Overworked American,* a study about the inter-relationships among working, shopping and leisure. In other words she deals with what in the world people do when they are not in the library. Her findings are that work is taking more and more of our time, suggesting public librarians should be sure some of their offerings are work-oriented.

2. As mentioned earlier, Westin and Finger wrote the results of a 1990 Louis Harris study; *Using Public Libraries in the Computer Age*. It found, among many other things, that use of reference services rose to 77% of library visitors, up from 51% in a 1978 Gallup survey.

3. Michael Weiss's study of America's neighborhoods (*The Clustering of America*) is an easy, often amusing, but thoughtful read for librarians. Where do library users fit among the lifestyles and eccentricities of the nation's 40 neighborhood types?

LIST OF EXHIBITS

Readers are urged to copy or modify these exhibits for their own use. Permission for reuse, but not for resale, has been obtained where needed. The State Library of Ohio, holder of the copyright on this workbook, encourages reuse.

The number of each exhibit refers to the chapter in which it was first mentioned.

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A SAMPLE PLAN FOR THE SPECIAL LIBRARY[1]

Kathy Shimpock-Vieweg[2]

Special libraries have traditionally been operated as cost centers. Effective marketing, however, can lead to increased library usage and cost recovery through client or departmental chargebacks. Such a library may be transformed into a profit center and become an essential element to the parent organization's success. In today's world of library cutbacks and reductions, marketing can help to insure a library's survival.

The marketing plan is the practical implementation of marketing theory as described throughout this book. It includes the standard situation analysis (background information); SWOT analysis (strengths, weaknesses, opportunities and threats); a determination of the library's mission and goals; and an examination of the "4 P's" of marketing (product, price, place and promotion) as found within market strategy. Although marketing plans are primarily "working documents," they are often utilized as proposals for additional funding or new projects. Supporting documents comprise the "fact book" and are attached as an appendix to the marketing plan. The "fact book" contains financial data, including the library's budget and staff billable hours, any user surveys, usage records and other statistics. Generally these statistics are only provided for a three to five year period. Any further reference to the "fact book" refers to such internal documents which have not been included here. And, finally, the marketing plan contains within it an action plan which takes the library's stated goals and quantifies them into a schedule of tasks, associated costs, and estimated completion dates. Hence, the success or failure of the plan can be tracked over time.

The following is an example of a marketing plan that can be used in a special library. Although the plan is drafted for a fictitious law firm library, it is equally as applicable for corporate or medical libraries. Variations on this plan have been successfully utilized.

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1. An earlier version of this plan can be found within the author's "How to Develop a Marketing Plan for a Law Firm Library," *Law Library Journal* 84, no. 1 (1992): 67-91.

2. Kathy Shimpock-Vieweg, J.D., M.L.L., M.B.A., is the Director of Library Services at the law firm O'Connor, Cavanagh in Phoenix, AZ. She has worked in both firm and academic law libraries for over ten years.

MCGUIRE, SAMPSON & DAVIS
LAW LIBRARY MARKETING PLAN: 1993

I. EXECUTIVE SUMMARY: Brief overview of the plan and recommendation for the marketing of services.

The law library of McGuire, Sampson, & Davis has an opportunity to enhance its visibility within the firm, thereby increasing

1) the number of billable hours attributable to library staff, and
2) the number of users in the library.

The results of a recent library user survey suggest that improvements are needed in the promotion of present services and also indicates additional user services to be implemented. In addition, changes are needed in the physical facility and the organization of the library to provide easier use of the collection and materials. All of the recommended actions can be accomplished with the present staffing and funding levels. The library's goals, therefore, are to increase library billables to the firm 15%, and library usage by 10% during the next twelve months.

II. SITUATION ANALYSIS: "Where are we and how did we get there?"

A. Background Information: Describe the current state of affairs regarding the law firm and library services.

1. **Firm.** The law firm of McGuire, Sampson & Davis was established in 1952. It presently has 180 attorneys and a support staff of 350. For the past five years, the firm has hired an average of twenty new associates per year, either through lateral hires or law schools. In the future, however, the firm intends to hire fifteen new associates per year and will hire in only developing practice areas.

   In 1988 the firm moved to its current facilities at the Herald Office Building and presently occupies seven floors. In 1980 the firm merged with Parks, Harris & Kim, in CaliCity to open a branch office. In 1988 the firm hired its first marketing director. Cost-cutting measures and attorney/paralegal reductions were initiated in 1989 due to the downturn in the U.S. economy.

   Major changes occurring in 1992 included the hiring of two library assistants. The firm also installed a large computer system networking law office PCs.

2. **Firm's Area of Expertise.** Legal services are provided in the following areas: government contracts, family law, corporate law, securities, municipal bonds, taxation, real estate, financial services, bankruptcy, estate planning, labor law, personal injury litigation, entertainment and sports law, commercial litigation, worker's compensation, appellate practice and criminal law.

3. **Library.** The main library is located on the 18th floor of the Herald Office Building, occupying approximately 8,000 square feet. The library has 7,000 linear feet of shelf capacity with a collection size of approximately 34,000 volumes. There are six PCs (connected to the main network) and four dedicated terminals in the library. There is also an attached training room with four additional dedicated terminals. Two satellite libraries in the areas of tax/securities and labor are located on other floors. The CaliCity branch has a small library of approximately 1,000 square feet with close to 8,000 volumes.

4. **Staffing.** The main library is presently staffed by two law librarians. (Director of Library: M.L.S., ten years library experience, four years at firm; Librarian: M.L.S., one year library experience, six months at firm), and four library assistants (non-degreed, sixteen years library experience, two years at firm; non-degreed, eight years library experience, three years at firm; B.A., one year library and firm experience; B.A., two years library experience and three at firm). There is also an outside filing service which works approximately sixteen hours a week.[3] The CaliCity library is staffed by a full-time librarian (M.L.S., four years library experience, two years at firm).

   The Library Director reports to the Library Committee which is composed of seven attorneys. The two librarians and four library assistants report to the Library Director.

5. **Library Products/Service Provided.** The library presently provides the following services for its users:

   * Retrieval and document delivery of journal articles, patents, monographs, government documents, standards and specifications
   * Selective dissemination of information (SDI) in the areas of news reports, legislative activity, new publication announcements
   * WESTLAW, LEXIS, NEXIS, DIALOG, DOW JONES, VU/TEXT, DATA TIMES, DATAQUICK, LEGIS-SLATE, OCLC and RLIN database searches
   * Basic business research of industries and companies
   * Retrieval of unpublished cases/briefs from other jurisdictions when available
   * Preparation of selective bibliographies and pathfinders
   * Research and assemblage of actual materials on a specific subject
   * Acquisition of new materials for cases or firm personnel
   * Cite-checking
   * Compile legislative histories
   * Interpret/translate citations and abbreviations
   * Weeding and collection development
   * Assemblage of materials and photocopy cases
   * Stack maintenance and library cleanliness
   * Circulation of library materials
   * Organize audio-visual, microforms, materials
   * Cataloging and classification of materials
   * Filing and updating materials

[3] Law and accounting firms often hire independent contractors to work as a filing service. This service updates the large serial holdings found within these libraries by filing updated pages in looseleaf services, or adding pocket parts or supplements.

6. **Library Fee Policy.** The library staff billing rate was re-evaluated in December 1992 and changed to the following schedule:

   Document Delivery (Requests filled from outside sources): $15.00 minimum per item, plus research time, phone calls, photocopies, purchase of reports and delivery charges

   Document Delivery (Requests filled internally): Photocopying charges only, when applicable

   Custom Research Services (Rates charged to firm clients):
   $85.00 per hour for the Library Director
   $75.00 per hour for the Librarians
   $50.00 per hour for the Library Assistants
   (plus phone calls, on-line charges, photocopies, and any other fees)

   Professional Growth Document Retrieval/Research: Free to firm personnel. Limited to manual research.

B. **Market Analysis and Forecast:** Study of library's user population, environment, resources, competition and parent organization.

1. **Library's User Population.** The library's user population consists of the attorneys, paralegals, law student clerks, nurse consultants, administrators, staff, secretaries, clients, librarians and other networking libraries. A survey was sent to the primary population (attorneys, paralegals, nurse consultants, firm investigators and administrators) in June, 1992. Out of 215 surveyed, 100 instruments were returned.

   The majority of those surveyed responded that the library's performance was either good or very good. Criticisms, however, ranged from facilities problems and difficulty with collection access to problems locating needed items in the collection.

   Most of those responding found the library's collection to be adequate for their needs, although some users felt that the environmental law collection was limited.

   Of the library services provided, routing of materials received the most negative comments. Responses also indicated that many users were unaware of the range of services available. Respondents expressed an interest in a newspaper journal clipping service and in providing additional research or database workshops. Finally, users felt that the five most important criteria for ascertaining library effectiveness were: range of materials, availability, materials quality, staff helpfulness, and range of service. Most of those responding do not anticipate a change in their library use during the next six months.

   The library distributes its products/services through a variety of media: telephone, fax, express delivery, CD-ROM (searches and print-outs), personal reference, computer services (searches, print-outs, and E-mail), microform, audio-video cassettes and manual research. In a law firm the choice of distribution tends to be a function of cost and speed of delivery.

   In the past, the library has promoted its services through occasional newsletters and memos, but because of staff changes, these have not been regular.

   Little library statistical information has been compiled up to this time, with the exception of user survey results, and budgetary information. (See Fact Book for available library statistics.)

2. **Environment.** The present legal market is in flux with law firms dissolving or reorganizing - the result of too many being overbuilt and underdiversified. In 1980, our area let the nation in creating new jobs: today it ranks in the lower quadrant. As migration has slowed and the benefits of unprofitable real estate ended (through the 1986 Federal Tax Reform Laws), bad loans have increased. Now many of the state's big savings and loans have been seized by the government.

   In addition, competition has increased through the merger of larger national law firms with smaller local offices. Many attorneys, however, view these new firms as being less successful than anticipated; as some branch offices have already closed.

   The economy has changed legal practice emphasizing the areas of intellectual property law, environmental law, litigation, employment law and bank workout activity: real estate and corporate law are now minimal.

3. **Resources.** In the past, funding for new acquisitions in the library was free flowing. Eventually the library's budget reached over $420,000.00. In an effort to provide more profitability to the firm (and in conjunction with the firm's other efforts toward cost reduction): the library has modified its acquisition policy. This entailed reviewing current publications to cancel items no longer used, revising the policy on the number of duplicate copies which can be held by attorneys, and not purchasing new titles unless found to be client billable or essential to practice. The library anticipates saving a minimum of $50,000.00 per year with this policy.

   Library staffing is presently adequate. During the summer of 1992, an additional professional librarian was hired, specializing in on-line reference and resources. A library assistant was also hired to fill a position vacated by turnover. The full-time librarian in CaliCity had been over-extended due to an increase of government contracts work. The hiring of a filing service, however, has met the current demand.

4. **Competition.** The law library's competitors include information brokers, area libraries and other attorneys/staff who perform tasks that could be more efficiently done by the library. However, over two-thirds of the survey's respondents have never used an outside service to obtain information.

   The library's present fee scale is very competitive with information brokers, the average charging $90.00 per hour. Although paralegal and nurse consultant fees may be lower, the library staff is more skilled in research techniques and database searching. The most cost-effective search, therefore, would be performed by the library staff. Problems do occur when users want to charge, to "overhead," library items that could be directly charged to clients.

5. **Parent Organization.** McGuire, Sampson & Davis has an excellent reputation as a law firm and continues as a profitable business. However, in an effort to increase service in a down-turned economy, and maximize profits, the firm implemented cost and staff reductions in December, 1989. These policies have continued to date.

C. Strengths and Weaknesses of McGuire, Sampson, & Davis and its Law Library:

1. Strengths

a. The law library staff is hard working, skilled and service-oriented.

b. Profit maximization efforts of the firm administrator support the billing of library services.

c. Staff reductions and turnovers in paralegals and entry level attorneys has left a void in doing preliminary legal research, which the library can fill.

d. The firm has a marketing director, who may be able to assist in developing a library marketing plan.

2. Weaknesses

a. No one on the library staff is an expert in marketing.

b. The marketing program will have to be set up without additional staffing or funds.

c. Library promotion in the past has been haphazard.

d. The firm's cost reduction philosophy may put pressure on the library to become even more accountable.

e. Many users are reluctant to bill for library services because they feel this service constitutes firm overhead.

D. Opportunities and Threats Facing McGuire, Sampson & Davis and its Law Library:

1. Opportunities

a. Legal practice has changed from a corporate/business emphasis to litigation and banking reorganization in which McGuire, Sampson & Davis has a strong reputation and expertise.

b. Outside information brokers are expensive and unpopular with users in this economy, thereby making the firm's library more essential.

2. Threats

a. The state's economy is slow and legal practice in the areas of real estate and corporate law is limited.

b. The state's legal market is in flux with many firms folding, reorganizing and merging. There is much movement of attorneys within the firms.

c. The state's political environment has not been successful in attracting new business.

d. Further economic decline could result in decreased profitability for the firm. The library may then be required to make substantial budget and staffing reductions.

III. ORGANIZATION'S MISSIONS, OBJECTIVES AND GOALS:

A. Mission Analysis: Identification of the basic purpose of the organization.

McGuire, Sampson & Davis' mission is the delivery of legal services to satisfy the needs of a client base while also achieving the goals of profitability and growth for the firm.

B. Library Objectives: Determine where library is headed.

1. To increase the number of library patrons using the library and its service.

2. To increase firm profitability by obtaining a larger number of billable requests from library users.

C. Goals: Select objectives to be emphasized, quantify and make relevant to a specified time period.[4]

The library successfully met its goals for 1992 in which billable library hours increased by 30% and library users by 20%. Based on these results the library goals for 1993 are as follows:

1. To increase the number of billable library hours 15% within the next twelve months.

2. To increase the number of library users by 10% within the next twelve months.

IV. MARKET STRATEGY: Description of how these goals will be met.

A. Market Segments Selected and Targeted:

As previously stated, library users are varied. The recent library survey has divided these users by job position, frequency of use, subject areas of interest and need for speed of delivery. Standard demographic variables were not included in the questionnaire because they are not relevant to this user group.

The law library, however, will not segment its users for marketing purposes but instead will use market "disaggregation".[5] Each individual user will be treated as a separate marketing segment, receiving unique and customized service. "Disaggregation" can be employed because the library's user population is fairly small, the group homogeneous, and the users' needs generally understood by the staff.

B. Positioning Relative to Competition:

The law library provides a wide range of customized services for its users. These are cheaper and more extensive than those provided by various competitors. Unfortunately, library users are not all aware of the available services and extensive promotion is needed.

[4] Goals are either determined by previous user statistics, or without these, based on a "best guess" estimate. Initial goals are generally higher as more results can be obtained if previous efforts have not been made toward marketing library services. A statement relating these goals to previous years' performance should be given if applicable.

[5] Many libraries engage in concentrated marketing where the focus is on specific user groups. Special libraries, however, have fairly homogeneous user groups. Marketing disaggregation is an extreme form of concentrated marketing. The focus here is on treating each individual library user as its own segment (i.e., focus on each user uniquely). This practice is often successfully used in special libraries where user needs are similar and well understood.

C. Product/Services:

From the most recent user survey it appears that all of the services presently being provided are necessary: some are found to be essential services while others appear more ancillary. There are, however, still needs being unmet. The following services will be initiated and/or emphasized during 1993.

The following services will support the goal of increased library usage: library tours, weeding and collection development, research seminars (both on-line and manual), increased emphasis on stack maintenance and library cleanliness, better circulation of library materials, more efficient routing of materials, and additional staff training of areas in service, conflict management, and legal research.

The following services will support the goal of increased library billable hours: retrieval and document delivery of journal articles, patents, monographs, government documents, standards and specifications, on-line database searches, basic business research on industries and companies, research and assemblage of actual materials on a specific subject, compiled legislative histories or pathfinders, library publications, clipping file, and interlibrary loans.

The present library staff is capable of performing all the services indicated above. Many of these services are currently being provided to frequent library users, although the majority of users are still unaware of what is available.

D. Pricing: Costs related to providing selected services and any funds recouped by charging for those services.

Most of the costs associated with providing the new services are minimal; salaries and facilities costs are already part of library overhead. More efficient use of the resources, however, will increase firm profitability by recouping library expenses with billable hours, or by providing a user-friendly library which allows its patrons to complete work in less time.

Some new services such as library publications, brochures, guides, maps, bibliographies and pathfinders will entail costs for photocopying and sign production.

The Law Librarian has access to little firm-wide financial information and only limited library accounting data. A request has been made to purchase software tracking library expenditures. It is hoped that once received, actual financial planning can occur.

As previously stated, the library's fee schedule appears to be competitive and was found to be profitable when compared against the actual cost for providing these services.

E. Place: Pertains to the physical aspects of the library facility and any methods used for the dissemination of information.

The main library facility was held not to be user-friendly by the respondents to the recent survey. Improvements are needed in the areas of increased directional materials (maps, signs, etc.), organization (arrangement of collection, mis-shelved items), and cleanliness. These are fairly easy items to correct once the staff is convinced of their importance.

Methods to disseminate information to library users remain a function of price and the speed desired for delivery. The constant need for billable information may emphasize the use of on-line resources as it can be directly charged to clients. This appears to be cheaper than maintaining hard copy subscriptions for items used by only a few patrons. Branch libraries with limited space will also stress on-line resources.

F. Promotion: Methods which increase library visibility within the firm.

A variety of methods will be employed to increase user awareness of the library within the firm. Although the staff is presently service-oriented, additional training may be needed to deal with the "difficult patron" and on conflict management. Training to develop staff research skills is also needed.

In order to reach the potential user, however, other means must be employed, including the following: point-of-purchase displays, regular library newsletter emphasizing services, orientation tours, library guides, FYI/SDI memos, special programs and workshops, presentations before the firm, annual report, staff name tags, suggestion box, new acquisition list, network and participation in professional organizations.

Both existing and new services can be promoted for more user awareness.

V. MARKETING ACTION PROGRAM: A schedule which details each marketing strategy including a timetable of activities and a listing of responsible parties.

Please note that many other library services will be provided as requested throughout this plan. (See Marketing Action Plan, last page of this article.)

VI. BUDGET: The impact of the total plan on the allocation of library resources.

A. Staffing: Levels are presently adequate to complete plan, although the timetable may be altered if large client projects are forthcoming.

B. Funds: Most of the projects will be accomplished with an efficient use of present resources. However, there will be additional costs incurred due to increased photocopying for library publications, brochures, guides and pathfinders (anticipated expenses being $950.00 per year); and a one time charge for new library signs (anticipated costs $200.00), library maps (anticipated costs $250.00), and a computer generated library logo (anticipated cost $200.00).

VII. CONTROLS: Feedback and re-evaluation of marketing plan and contingency planning.

The Law Librarian will monitor the progress of goals and measure marketing performance against the established criteria. The review dates are set in the marketing plan and will be initiated quarterly.

Because of the wide range of activities and services to be provided, contingency planning will be limited. Services and promotions can be altered or the level varied as needed.

VIII. MARKETING AUDIT: Periodic examination of marketing plan, re-evaluate progress against the mission and objectives.

The Marketing Audit will occur every two years providing a thorough examination of all essential aspects of the program. The auditor, if possible, should be an objective party who can judge library marketing performance and make recommendations (perhaps another law librarian outside the firm).

EXHIBIT 1-A

FACT BOOK[6]

CONTENTS

I. Financial Data

A. Library Budget - last 3 years

B. Library Billable Hours - last 3 years

II. User Survey Results

[6] As indicated previously, examples of these internal documents are not included within this article.

ILLUSTRATION #1: MARKETING ACTION PLAN

YEAR: 1993

LAW LIBRARY MARKETING PLAN

RESPONSIBLE PARTY	PROJECT / PROJECTED COST/HRS	ACTION AND COMPLETION DATES												EVALUATION PERIOD			
		J	F	M	A	M	J	J	A	S	O	N	D	1/4	1/2	3/4	1
Assistant Librarian	Research Seminar												12/1	9/20	10/	11/	12/1
Main Office	$150.00 photocopy handouts											11/ 15			15	30	
Director Library	Library Newsletter		2/1		4/1		6/1		8/1		10/1		12/1	3/1	6/1	10/1	12/1
	$200 Logo $600 Photocopies	1/15	2/1		4/1		6/1		8/1		10/1		12/1				
Serials Assistant	Revise Routing Procedure								8/15					2/	4/	6/	8/
	48 hrs labor		Labor	Throughout										15	15	15	15
Library Assistant/ Public Services	Design/purchase New Library Map				4/10									1/	2/	3/	4/
	$250 map			3/1										25	19	16	10
Technical Services Assistant	New Book (Off Line) Catalog						6/1							3/1	4/1	5/1	6/1
	$200 photocopies					5/20											

EXHIBIT 1-A

WORKSHEET
Estimate of Annual Marketing Effort

Library _____ Period _____, 19__

1000 Salaries and Benefits	**Total Expenditures**	**Percent Marketing**	**Net**
_____	_____	_____%	_____
_____	_____	_____%	_____
_____	_____	_____%	_____
_____	_____	_____%	_____
_____	_____	_____%	_____
_____	_____	_____%	_____
_____	_____	_____%	_____
_____	_____	_____%	_____

Total Salaries _____

Benefits at ____% of Salaries _____

Total Salaries and Benefits Devoted to Marketing _____

2000 Supplies

_____	_____	_____%	_____
_____	_____	_____%	_____
_____	_____	_____%	_____
_____	_____	_____%	_____

Total Supplies Expense Devoted to Marketing _____

3000 Purchased & Contracted Services

Other Operating Expenses

_____	_____	_____%	_____
_____	_____	_____%	_____
_____	_____	_____%	_____
_____	_____	_____%	_____

Total Other Operating Expenses Devoted to Marketing _____

Total All Expenditures Devoted to Marketing _____

Total General Fund - Operating Expenses _____

Percent of General Fund Expenditures Devoted to Marketing _____

Note: For this purpose "marketing" includes public relations expenditures. Account numbers are based on those prescribed by State Library of Ohio.

Percent Marketing column is the best guess of library personnel.

Source: Western Reserve Associates

EXHIBIT 4-A1

SAMPLE WORKSHEET
Estimate of Annual Marketing Effort

Library Boomtown Public Library Period Full Year, 1993

1000 Salaries and Benefits	Total Expenditures	Percent Marketing	Net
Administrative (Director's Office, etc.)	$232,000	25 %	$58,000
		%	
Public Relations	53,000	100 %	53,000
Technical, Adult	683,000	20 %	137,000
Children's Services,		%	
Branches - Salaries	601,000	10 %	60,000
		%	
		%	

Total Salaries 308,000

Benefits at 30 % of Salaries 92,000

(1) Total Salaries and Benefits Devoted to Marketing 400,000

2000 Supplies

2130 - Printing	6,000	75 %	5,000
		%	
		%	
		%	

(2) Total Supplies Expense Devoted to Marketing 5,000

3000 Purchased & Contracted Services

Other Operating Expenses

3110 - 31 - 30 Travel / Meetings	21,000	25 %	5,000
3280 Printing by Vendor	18,000	100 %	18,000
3295 Artist/Photos	1,000	100 %	1,000
		%	

(3) Total Other Operating Expenses Devoted to Marketing 24,000

(4) Total All Expenditures Devoted to Marketing 429,000

(5) Total General Fund - Operating Expenses 4,100,000

Percent of General Fund Expenditures Devoted to Marketing 10% *

* *Final percentage in this sample is not necessarily a standard for all libraries.*

Note: For this purpose "marketing" includes public relations expenditures. Account numbers are based on those prescribed by State Library of Ohio.

Percent Marketing column is the best guess of library personnel.

Source: Western Reserve Associates

EXHIBIT 4-B

SAMPLE SELF-ASSESSMENT - PUBLIC LIBRARY

Service

Collections:	Complete**	Usable But Incomplete/ Outdated		Nonexistent	Comments
Reference					
Non-Fiction					
Fiction					
Video/records/CD					
_____*					
_____					
_____					

Automated Services:	Fully Implemented		Partial Function		Nonexistent	Comments
Periodical Index						
Info-Trac						
On-Line Catalog/Searches						
CD-ROM						
Data Base Service						
_____*						
_____						
_____						

Staff Services:	Helpful Knowledgeable		Of Some Assistance		Cold Ignorant	Comments
Adult Services/Reference						
Circulation						
Automation Assistance						
_____*						
_____						
_____						

Facilities:	Fully Used		Some Use		Nonexistent	Comments
Meeting Rooms						
Copiers						
_____*						
_____						
_____						

* Add/delete services as appropriate for your library ** All column headings are your choice

EXHIBIT 4-C

SAMPLE SELF-ASSESSMENT - CORPORATE LIBRARY

Service

	Current/ Complete **	Usable But Incomplete	Minimal or Nonexistent	Comments
Collections:				
Engineering Journals				
Mongraphs				
Chemistry Journals				
Mongraphs				
Legal				
Marketing				
_____ *				
_____				
_____				

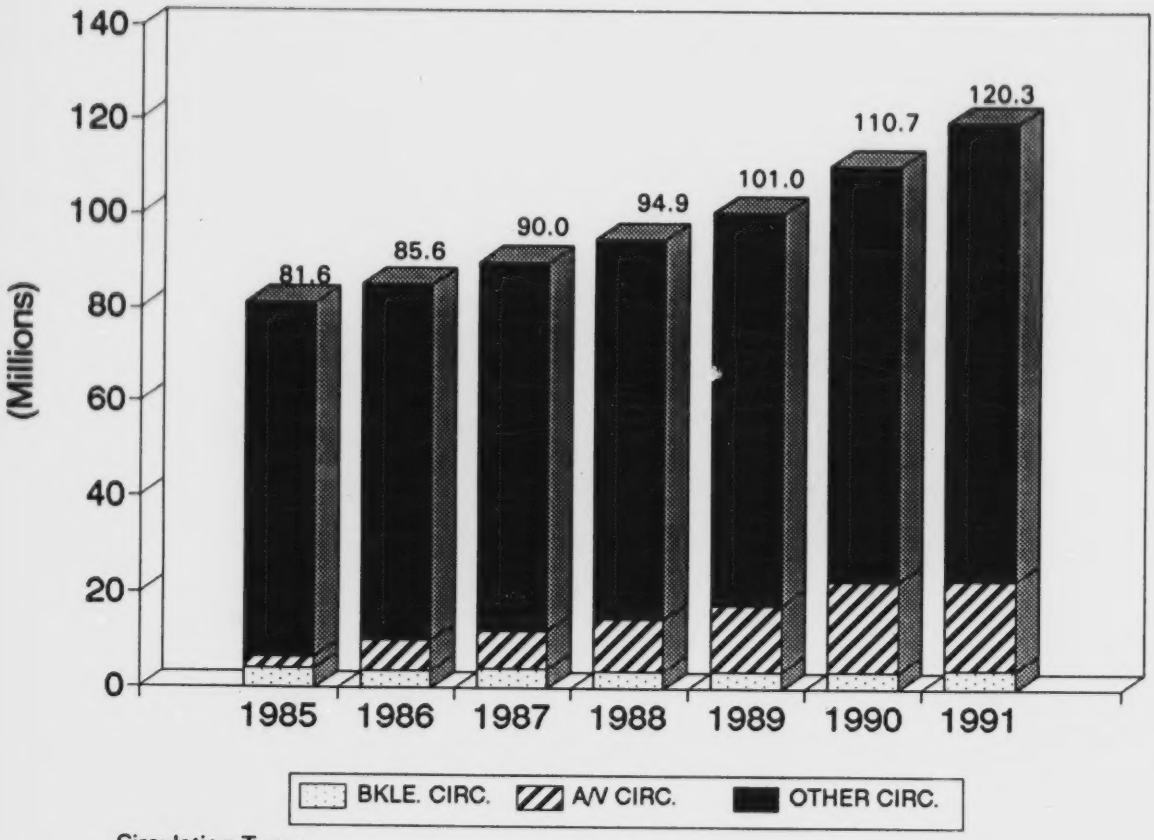
	Fully Implemented	Partial Function	Nonexistent	Comments
Automated Services:				
Dialog				
On-Line Catalog				
CD-ROM				
Nexis/Lexis				
_____ *				
_____				
_____				

	Knowledgeable	Of Some Assistance	Untrained	Comments
Staff Education/Skills:				
Media/technology				
Understanding of Corp. Objectives				
_____ *				
_____				
_____				

* Add/delete services as appropriate for your library

** All column headings are your choice

OHIO PUBLIC LIBRARIES TOTAL CIRCULATION
1985 - 1991



Circulation Type:

Other	74.9	75.3	77.8	80.2	83.3	88.0	97.2
A/V	2.8	6.6	8.4	11.2	14.0	18.9	19.2
Bookmobile	3.9	3.7	3.8	3.5	3.7	3.8	3.9

Source: State Library of Ohio

QUALITY ASSESSMENT
Questionnaire

This questionnaire is part of our internal learning process. Please answer the following questions honestly. This is a chance to express your concerns privately. Your answers will form the basis for setting our standards and procedures.

1. Describe the high point and low point for you professionally during the past year. How can you repeat the same high and avoid the same low?

2. What is your definition of quality? Please elaborate.

3. Based on your definition of quality, how would you rate our library's performance in terms of delivering our service? Why?

4. How do you think our clients would rate us? Quality?

5. Do you have any suggestions as to how we might improve productivity, quality and performance?

6. If you could change one thing about this operation, what would it be?

_____ _____

Signature (not required) Date

Source: Lachina Publishing Services, Inc.
Cleveland, Ohio

FOCUS GROUPS

Many libraries use focus groups as a way of obtaining fresh insight into improving public service. This discussion illustrates the most effective way to run a focus group session in order to yield the most significant results.

A focus group is a gathering of six to ten persons who spend a few hours with a skilled interviewer to discuss a project, service, organization, or other marketing entity. The interviewer needs objectivity, knowledge of the subject matter and industry, and knowledge of group dynamics and consumer behavior; otherwise the results can be misleading. The participants may be paid a small sum for attending. The meeting is typically held in pleasant surroundings (a home for example), and refreshments are served to increase the informality. The interviewer encourages free and easy discussion among the participants, hoping that the group dynamics will reveal deep feelings and thoughts that are new to the researcher.

Focus group research is a useful exploratory step to take before designing a large-scale survey. It provides insight into consumer perceptions, attitudes, and satisfaction that will be important in defining the issues to be researched more formally. Consumer goods companies interested in the appeal of specific products have been using focus groups for many years, and an increasing number of newspapers, law firms, hospitals, and public service organizations are discovering their value.

The key success factors for a focus group are:

A) planning the agenda,
B) recruiting participants,
C) effective moderation, and
D) analysis and interpretation of the results.

A. Planning the Agenda

The research purpose is translated into a set of questions that will be asked of the focus group. This ensures that client and moderator are in agreement on specific objectives before the study begins. From these questions the group moderator can prepare a topic outline. The outline serves as a checklist of the specific issues and topics to be covered; however, the list is strictly for general use as it is not desirable to have formal questions that are read to the group. An important issue is the ordering of topics by the moderator. Usually it is desirable to proceed from a general discussion to increasingly specific questions, for if the specific issue is addressed first, it will influence the general discussion. Often, the sessions are conducted with a tape recorder in order to simplify the review after the session.

B. Recruitment

When recruiting participants it is necessary to provide for both similarity and contrast within a group. As a rule it is not always desirable to combine participants from different social classes or stages in the life cycle, because of differences in perceptions, experiences, and verbal skills. Within an otherwise similar group some contrast in opinions can be achieved, for example, by including both users and nonusers of the product.

C. Moderation

Effective moderating encourages all participants to discuss their feelings, anxieties, and frustrations as well as the depth of their convictions on issues relevant to the topic, without being biased or pressured by the situation. The following are critical moderating skills:

(l) Ability to establish rapport quickly by listening carefully, demonstrating a genuine interest in the views of each participant, dressing like the participants, and avoiding the use of jargon or sophisticated terminology that may turn off the group.

(2) Flexibility in implementing the interview agenda in a manner that the group finds comfortable.

(3) Ability to sense when a topic has been exhausted or is becoming threatening.

(4) Ability to control group influences to avoid having a dominant individual or subgroup, which might suppress the total contribution.

D. Analysis and Interpretation of the Results

This is complicated by the wealth of disparate comments obtained, which means that any analyst can find something that agrees with their view of the problem. A useful report of a group session is one that captures the range of impressions and observations on each topic and interprets them in light of possible hypotheses for further testing. Several features of group interaction must be kept in mind during the analysis. An evaluation of a new concept by a group tends to be conservative; that is, it favors ideas that are easy to explain and therefore not very new. There are further problems with the order of presentation when several concepts, products, or advertisements are being evaluated. If group participants have been highly critical of one thing, they may compensate by being uncritical of the next.

Source: Western Reserve Associates

EXHIBIT 6-B

TELEPHONE INTERVIEW

Library: _____ Interview Date: _____ 19_____

[INTERVIEWER, IF A CHILD ANSWERS THE PHONE, ASK TO SPEAK TO AN ADULT IN THE HOME.]

Hello, this is ___(name)___ calling on behalf of the _____ Public Library. The library is conducting a short survey of residents and we would like to ask you some questions. The survey would take less than 10 minutes of your time and your answers would be kept totally confidential. Are you willing to help the library in this way?

1. Are you a resident of _____? ..... Y___ N___

   [IF NO, GO TO END, AND THANK RESPONDENT]

   How long have you lived in _____? ___ Years ___ Mos.

2. Have you used the _____ Public Library in the past six months? ... Y___ N___

   [IF NO, GO TO QUESTION 7]

3. Do you have a library card which can be used at this public library? ..... Y___ N___

4. Which branch do you most often use?

   _____

   _____

   _____

   _____

5. Do you regularly use any other library? ..... Y___ N___

   If so, what library?

   _____

   _____

   _____

6. People use libraries in many different ways. I'd like to ask you if you have used this library in any of the following ways during the past six months:

   [IF NO, "DID YOU KNOW THE SERVICE WAS AVAILABLE?"]

   - Have you taken out books? ..... Y___ N___
   - Have you browsed around or read in this library? ..... Y___ N___
   - Have you taken out magazines? ..... Y___ N___ Avail ___
   - Have you asked for information at the reference desk? ..... Y___ N___ Avail ___
   - Have you studied or done school work at the library? ..... Y___ N___ Avail ___
   - Have you taken out video cassettes from this library? ..... Y___ N___ Avail ___
   - Have you checked out phonograph records? ..... Y___ N___ Avail ___
   - Have you taken out compact disc records (CD's)? ..... Y___ N___ Avail ___
   - Have you used the photocopy machine? ..... Y___ N___ Avail ___
   - Have you attended programs put on by the library (for example, films, book discussions, travel programs and so forth)? ..... Y___ N___ Avail ___
   - Have you attended meetings of organizations held in the library? . Y___ N___ Avail ___
   - Have you attended book sales at the library? ..... Y___ N___ Avail ___
   - Have you looked up information in the library? ..... Y___ N___
   - Are there any other ways you have used this library? ..... Y___ N___
     [IF YES] How? _____

7. In general, libraries can be used for several different purposes. I am going to read you several of these purposes and I'd like you to tell me the purposes that are most important to you.

Checking out written materials	_____	Asking for information	_____
Checking out audiovisual materials	_____	Browsing and reading in library	_____
Attending meetings or programs	_____		

Which is most important? **[INTERVIEWER RECORD A "1" ABOVE]**

Which is next most important? **[RECORD A "2" ABOVE]**

Which is next most important? **[RECORD A "3", THEN A "4" ABOVE]**

8. Are there any preschool children (children 4 years old or younger) in your household? . . . . . Y___ N___

[IF NO, GO TO QUESTION 9]

Have they ever been to this library? . . . . . Y___ N___

Have they ever been to any children's programs at the library (for example, story hour)? . . . . . Y___ N___

9. Are there any children between 5 and 13 in your household? . . . . . Y___ N___

[IF NO, GO TO QUESTION 10] How many? _____

Do any of them have a library card that can be used at this library? . . . . . Y___ N___ DK___

During the past six months have they ever:

- Checked out books? . . . . . Y___ N___ DK___
- Browsed or read in the library? . . . . . Y___ N___ DK___
- Done any homework in the library? . . . . . Y___ N___ DK___
- Used the reference desk? . . . . . Y___ N___ DK___
- Checked out magazines from the library? . . . . . Y___ N___ DK___
- Taken out video cassettes? . . . . . Y___ N___ DK___
- Checked out phonograph records? . . . . . Y___ N___ DK___
- Taken out compact disc records? . . . . . Y___ N___ DK___
- Used a photocopier at the library? . . . . . Y___ N___ DK___
- Attended any programs put on by the library? . . . . Y___ N___ DK___
- Attended any booksales? . . . . . Y___ N___ DK___

10. Are there any children between 14 and 18 in your household? . . . . . Y___ N___

[IF NO, GO TO QUESTION 11] How many? _____

Do any of them have a library card that can be used at this library? . . . . . Y___ N___ DK___

During the past six months have they ever:

- Checked out books? . . . . . Y___ N___ DK___
- Browsed or read in the library? . . . . . Y___ N___ DK___
- Done any homework in the library? . . . . . Y___ N___ DK___
- Used the reference desk? . . . . . Y___ N___ DK___
- Checked out magazines from the library? . . . . . Y___ N___ DK___
- Taken out video cassettes? . . . . . Y___ N___ DK___
- Checked out phonograph records? . . . . . Y___ N___ DK___
- Taken out compact disc records? . . . . . Y___ N___ DK___
- Used a photocopier at the library? . . . . . Y___ N___ DK___
- Attended any programs put on by the library? . . . . Y___ N___ DK___
- Attended any booksales? . . . . . Y___ N___ DK___

11. Are there any other adults in your household? . . . . . Y___ N___

[IF NO, GO TO QUESTION 12] How many? _____

Do any of them have a library card that can be used at this library? ..... Y ___ N ___ DK ___

During the past six months have they ever:

- Checked out books? ..... Y ___ N ___ DK ___
- Browsed or read in the library? ..... Y ___ N ___ DK ___
- Done any homework in the library? ..... Y ___ N ___ DK ___
- Used the reference desk? ..... Y ___ N ___ DK ___
- Checked out magazines from the library? ..... Y ___ N ___ DK ___
- Taken out video cassettes? ..... Y ___ N ___ DK ___
- Checked out phonograph records? ..... Y ___ N ___ DK ___
- Taken out compact disc records? ..... Y ___ N ___ DK ___
- Used a photocopier at the library? ..... Y ___ N ___ DK ___
- Attended any programs put on by the library? .... Y ___ N ___ DK ___
- Attended any booksales? ..... Y ___ N ___ DK ___

12. Have you ever looked for a book on the computerized online catalog (computerized card index)? ..... Y ___ N ___

    [IF YES] Were you able to locate the book or books you wanted? ..... Y ___ N ___ Sometimes ___

13. From your experience, would you say that people who work for the library . . .

    Are generally helpful? ..... Y ___ N ___

    Are generally friendly? ..... Y ___ N ___

14. Do you feel that this public library is a worthwhile investment of public funds? Y ___ N ___

15. All things considered, what do you feel is this library's best contribution to the community? _____

    _____

    _____

16. Is there anything about the library that you feel could be improved or changed? Y ___ N ___

    If so, what: _____

    _____

    _____

17. Would you categorize your age as:

    18–39 _____

    40–65 _____

    over 65 _____

18. What is the highest grade of school that you have completed?

< Eighth	_____	Eleventh	_____	College grad	_____
Eighth	_____	Twelfth	_____	Some post college	_____
Ninth	_____	Some college	_____	Post college grad	_____
Tenth	_____				

19. **[IF ONLY 1 ADULT IN HOME:]**

    Lastly, what is the occupation of the primary wage earner in your home? _____

    [IF MORE THAN 1 ADULT IN HOME:]

    Lastly, what are the occupations of any adult wage earners in your home?

    (A) _____ (C) _____

    (B) _____

Thank you for the time that you have taken to answer these questions. A copy of the survey's results will be available for your review in the library.

Source: Cleveland Heights-University Heights Public Library

BP AMERICA REGIONAL CENTER
REFERENCE CENTER SURVEY

The Reference Center offers a variety of professional information services. Your CANDID participation in this survey is essential in evaluating the quality of existing services and creating new programs to meet YOUR changing information needs. Your response will help determine future library services, so please take a few minutes to answer the questions on the following pages. **Where appropriate, feel free to circle as many answers as are pertinent.**

If you have any inquiries concerning this survey, contact Dorothy Jankowski at 216-586-6054 (SONET 7-250-6054). Return your completed survey within 10 working days to REFERENCE CENTER, 6-P-1765.

1. How would you characterize your use of the Reference Center?

A. Frequent
B. Occasional
C. Seldom
D. Fluctuates - depending on current project
E. Never

If you have never used the Reference Center, which of the following reasons best explains why? **Then skip to Question 14**

A. Not aware of library services
B. Information needed is not available in the library
C. Job does not require use of library
D. Library is not easily accessible
E. Library hours are not convenient
F. Other (Please specify):

2. Over the last six months has your use of the Reference Center

A. Increased
B. Decreased
C. Remained the same

3. How have you learned about the services of the Reference Center?

A. Presentation by Librarian
B. Colleague
C. Library Brochure/Flyer
D. Other (Please specify):

EXHIBIT 6-C

4. Please indicate your usage of the following existing services:

	Often	Occasional	Seldom	Never But Aware	Unaware
Quick Reference					
Research					
Article Photocopies					
Book Ordering					
Current Newspapers					
Information Update Services					
Reference Collection					

5. Please rate the quality of the following existing services:

	Excellent	Good	Fair	Poor	Don't Know
Quick Reference					
Research					
Article Photocopies					
Book Ordering					
Current Newspapers					
Information Update Service					
Reference Collection					
Meeting Deadlines					

6. Since the Project 1990 downsizing and reorganization of the Reference Center, many of the information services formerly provided have had to be discontinued. Are you inconvenienced by the discontinuation of:

	Greatly	Somewhat	Not at all
Subscription Ordering			
Journal Circulation			
Book Collection			
Books Borrowed from Other Libraries			
Annual Reports Collection			
Journal Back Issues			
Newspaper Collection			
Other (Please specify):			

7. What impact do library services have on your ability to do your job?

A. Significant
B. Moderate
C. Slight
D. No Impact
E. Don't Know

8. How many hours would you estimate the Reference Center saves you per month?

9. How do you like to make your requests for information?

A. Telephone
B. Electronic mail
C. Videotext request form
D. In person
E. Inter-office mail
F. Other (Please Specify):

10. When do you usually contact the Reference Center?

A. When beginning a new project
B. As needed for a specific piece of information
C. For an overview or background on a topic
D. When all other resources are exhausted
E. Other (please specify):

11. I would like to have my information request results delivered in the following manner:

A. To my electronic mail box
B. Via a telephone message
C. Hand delivered to my office
D. Inter-office mail
E. Picking the results up at the Reference Center
F. Fax
G. Other (please specify):

12. I would like to have my information delivered in the following format(s):

A. Paper/hard copy
B. ASCII, spreadsheet or database format
C. On a diskette (DOS or Apple format)
D. Via my electronic mailbox

13. The type of personal Computer I use is:

A. Apple or compatible
B. IBM or compatible
C. Other (please specify):
D. I do not use a computer

14. Which of the following kinds of information do you use in your position?

A. Addresses and Telephone #s
B. Benefits Information
C. Company Profiles
D. Competitor Analysis
E. Economic Indicators
F. Government Regulations
G. Import/Export Data
H. Industry Research
I. International Information
J. Financial Data
K. Legal Information
L. Marketing and Demographic Information
M. News
N. Patents
O. Pricing
P. Product Research
Q. Stock Market Data
R. Supply/Demand Statistics
S. Tax Updates
T. Technical/Scientific Information
U. Other (Please specify):

15. Are you currently working towards a college degree?

A. Yes If so, what degree?_____
B. No

16. Are you assigned to any project teams?

A. Yes
B. No **Skip to Question 18**

17. Could your team benefit from:

A. An information specialist included on the team?

1. Yes, contact_____for more information.
2. Maybe, I will check with the team.
3. No.

B. The provision of research for background or on a particular subject for the use of team members?

1. Yes, contact_____for more information.
2. Maybe, I will check with the team.
3. No.

18. What information services, not currently provided by the Reference Center, would you like to have available to help you do your job more easily?

19. Please note any additional comments, recommendations or criticisms.

20. Name:

    Office address:

    Telephone:

    FAX:

    Unit number:

    Business and/or Department name:

    Job Title or Position:

The staff of the Reference Center thanks you for taking the time to complete this survey.

Source: BP America

INFORMATION NEEDS SURVEY

Instructions

This survey is designed to determine how you as a Z-Corp staff member use information. It is part of the Professional Information System study to define the current state of professional information services and systems at Z-Corp, and how they address the current and anticipated needs of Z-Corp staff. As you read through the items of this survey, please think generically in terms of the information sources you have, the information formats you use, and the ways you gain access to information.

1. Job Category: choose one

- ☐ Technical Staff, Gr3 and above
- ☐ Technical Staff, Gr1 & Gr2
- ☐ Technician
- ☐ Project/Program Manager
- ☐ Marketing Manager – Business Group
- ☐ Operations/Department Manager – Business Group
- ☐ Service Group Manager/Supervisor
- ☐ Service Group Staff

2. Years at Z-Corp Years in Career

☐	0 - 5	☐
☐	5 - 10	☐
☐	10 - 15	☐
☐	15 - 20	☐
☐	20+	☐

3. What impact does information generated outside Z-Corp have on your ability to do your job?

☐ Significant ☐ Moderate ☐ Slight ☐ None

4. Do you need access to information in disciplines other than your own?

☐ Very Frequently ☐ Frequently ☐ Seldom ☐ Never

EXHIBIT 6-D

5. Primary Source Materials. Please rate the level of importance of the various resources as your primary information source. Show current (1992) level of importance in the left half, the projected (1995) importance in the right half of the table.

Information Resource	Current Importance as Primary Source				Projected Importance As Primary Source			
	High	Medium	Low	N/A	High	Medium	Low	N/A
Popular Literature: Newspapers, Magazines (Time, Newsweek, Economist), Newsletters								
Personal Collection: Books, Journals, Conference Papers								
Local Collection: Project Level Reports, Standards, and Documents; Project Files								
Special Collection: Business Group Level Reports, Standards, and Documents								
On-Site Library (Z-Corp Main Library, Branch Library Collections)								
Off-Site Library (Federal, State, Academic, Research, Other Special)								
U.S. Government Department or Agency (Patents, DOE, DoD, NASA, etc.)								
Foreign Government Department or International Agency (DIN, GOST, WHO, etc.)								
Professional Society/Trade Groups (unpublished materials)								
Technical Journals, Academic Journals (with little/no advertising, e.g., JACS, Nature)								
Trade Journals (with advertising, e.g., Business Week, Chemical Week, InfoWorld)								
Colleague Network (unpublished materials)								
U.S. Based Commercial Vendor (DIALOG, NEXUS, LEXUS, etc.)								
Foreign Based Commercial Vendor (Data-Star, similar data bases, etc.)								
Other (List Examples)								

EXHIBIT 6-D

6. Access Modes. Please rate the level of use of the various access modes for obtaining information. Show current (1992) level of use in the left half, the projected (1995) level of use in the right half of the table.

EXHIBIT 6-D

Access Mode	Current Level of Use				Projected Level of Use			
	High	Medium	Low	N/A	High	Medium	Low	N/A
Primary Hard Source: Books, Journals, Reports Retrieved as Hard Copy								
Secondary Hard Source: Books, Journals, Reports Retrieved as Photocopy								
Desk Top: Personal Computer on a Local Area Net, Bulletin Board								
Work Station: Dedicated Terminal to Main Frame or Wide Area Net								
Work Station: Dedicated Terminal to Remote Network								
Removable Hard Drive or Other Input/Output Peripheral Device								
CD-ROM Retrieval (Compact Disk-Read Only Memory)								
Optical Disk Retrieval, Hypertext								
Floppy Disk								
Magnetic Tape								
Microform: Microfilm and Microfiche								
Multimedia: Integrated Text, Graphics, and Sound								
Other (List Examples)								

EXHIBIT 6-D

7. Desired Attributes. Please rate the importance of the following information service attributes.

Service Attribute	Very Important 1	2	3	Not Important 4
Cost				
Control of search process				
Standing (general) search service				
Customized (alert) search service				
Flexibility				
Convenience				
Access to support specialist				
Turnaround time				
Ability to browse				
Hard copy				
Electronic media				
Accessibility of information				
Ease of use				
How important is it to you that we have a physical, visible library facility for materials and services?				

8. Comments and Concerns:

Source: Major corporate library - anonymous

EXHIBIT 10-A

Graduate Student Questionnaire

In completing this Graduate Student Questionnaire, please read each question carefully and mark your answer either in pencil or pen. When you are finished, please staple with our return address on the outside and place in mail. Thank you for your assistance.

PLEASE RETURN BY

I. YOUR PROGRAM

1. Which of the following describes you at present:
   a. 1 ☐ 1st, 2 ☐ 2nd, 3 ☐ 3rd, 4 ☐ 4th year in degree program
   6 ☐ nondegree 5 ☐ 5th year or higher
   b. (check all that apply)
   1 ☐ taking courses
   2 ☐ doing thesis/dissertation research
   3 ☐ writing thesis/dissertation
   4 ☐ other_____

2. a. Dept._____ 1 ☐ master's 2 ☐ PhD
   b. If master's, will you be writing a thesis or equivalent?
   1 ☐yes 2 ☐ no
   c. Within this dept./program, what is your area of concentration?_____

3. In what year, and field of study, and at what school did you obtain your **last** degree?

Degree	Year	Major	School
1 bachelor's	____	____	____
2 master's	____	____	____
3 PhD	____	____	____

4. When do you expect to graduate? (check month and year)

1 ☐ May	1 ☐ 1988	4 ☐ 1991
2 ☐ August	2 ☐ 1989	5 ☐ 1992
3 ☐ December	3 ☐ 1990	6 ☐ other____

5. What is the average number of credit hours you take each semester?
   1 ☐ 3 2 ☐ 6 3 ☐ 9 4 ☐ 12 5 ☐ 15 6 ☐ over15

II. COURSEWORK

6. a. On the average, how many research papers are you required to do each semester?
   1 ☐ 0 2 ☐ 1-2 3 ☐ 3-4 4 ☐ 5-7 5 ☐ 8+
   b. How many of those papers require use of library materials?
   1 ☐ 0 2 ☐ 1-2 3 ☐ 3-4 4 ☐ 5-7 5 ☐ 8+

7. a. On the average, how many projects, other than research papers, (such as oral presentations, artwork, computer programs, lab experiments, etc), are you required to do each semester?
   1 ☐ 0 2 ☐ 1-2 3 ☐ 3-4 4 ☐ 5-7 5 ☐ 8+
   b. How many of those projects require use of library materials?
   1 ☐ 0 2 ☐ 1-2 3 ☐ 3-4 4 ☐ 5-7 5 ☐ 8+
   c. What is an example of a project you have completed for one of your courses?_____

8. How do you usually formulate topics for research papers or projects? (check all that apply)
   1 ☐ instructor assigns
   2 ☐ instructor suggests
   3 ☐ I choose from list of suggested topics
   4 ☐ from course related reading
   5 ☐ from personal (non-course related) reading or research
   6 ☐ try to relate papers or projects to thesis/dissertation topic
   7 ☐ other_____

9. After selecting a topic, this is what I usually do when I start working on a research paper or project: (check all that apply)
   1 ☐ discuss with instructor
   2 ☐ ask librarians for suggestions
   3 ☐ ask other students for ideas
   4 ☐ use indexes to magazines or journals in the library
   5 ☐ see what books we have on the subject in the BGSU card catalog or computer catalog
   6 ☐ use a textbook
   7 ☐ have a computer database search done for me
   8 ☐ other_____

10. a. Are you required to use journal articles for your research papers? 1 ☐ yes 2 ☐ no 3 ☐ sometimes
    b. If "yes" or "sometimes", how do you usually find relevant articles? (check all that apply)
       1 ☐ ask instructor for references
       2 ☐ browse through journals in my field
       3 ☐ use indexes, abstracts, or bibliographies in the library
       4 ☐ have a computer database search done for me
       5 ☐ other_____

11. In which areas of your research do you have the most difficulty? (check all that apply)
    1 ☐ topic formulation
    2 ☐ literature review (finding relevant articles and books on your topic)
    3 ☐ data collection and analysis
    4 ☐ writing
    5 ☐ other_____

12. How do you usually find out about services offered by the university? (check all that apply)
    1 ☐ my advisor
    2 ☐ BG News
    3 ☐ mail in my dept.
    4 ☐ in class
    5 ☐ other_____

III. THESIS/DISSERTATION

(if not doing thesis or dissertation, SKIP to Question 17)

13. Have you decided on the topic of your thesis or dissertation?
    1 ☐ yes 2 ☐ no (if not, skip to Question 17)

14. a. How did you determine the topic of your thesis/dissertation? (check all that apply)
       1 ☐ my advisor suggested it
       2 ☐ another instructor suggested it
       3 ☐ coursework
       4 ☐ readings (outside of course requirements)
       5 ☐ I've always been interested in this
       6 ☐ other_____
    b. Did you examine the collections of the BGSU libraries before deciding on your topic?
       1 ☐ yes 2 ☐ no

15. How much direction do you receive from your advisor? (check one best answer)
    1 ☐ I'm on my own
    2 ☐ my advisor provides helpful assistance when asked
    3 ☐ my advisor provides some direction but another person is more influential in assisting me_____ (person's title)
    4 ☐ nearly every step is directed by my advisor

16. Where did/will you collect your "data" or the source material for your thesis/dissertation? (list percent of total for as many of the following choices as apply)
    1 ☐ a. library materials - journal articles, books, etc.
    2 ☐ b. field work
    3 ☐ c. lab work
    4 ☐ d. survey
    5 ☐ e. music, recordings, etc.
    6 ☐ f. archives, manuscript collections
    7 ☐ g. other_____

IV. BGSU LIBRARY RESOURCES

EXHIBIT 10-A

17. Which of the following resources have you used?
    1 ☐ card catalog
    2 ☐ LS/2 (library computer catalog)
    3 ☐ OCLC (computer that shows holdings of all libraries in North America)
    4 ☐ ERIC on CD-ROM (computer index to education related articles and reports)
    5 ☐ InfoTrac (computer index to magazines)
    6 ☐ Newsbank (computer index to newspapers)
    7 ☐ Dissertation Abstracts
    8 ☐ Psychological Abstracts
    9 ☐ Social Sciences Citation Index
    10 ☐ Science Citation Index
    11 ☐ Chemical Abstracts
    12 ☐ librarian
    13 ☐ other_____

18. a. Approximately what percent of the time do you **find** the material you need in the BGSU libraries?
    1 ☐0% 2 ☐25% 3 ☐50% 4 ☐75% 5 ☐100%
    b. When you **don't find** material what is the usual reason? (check all that apply)
    1 ☐ library does not own
    2 ☐ checked out
    3 ☐ missing from shelf when I look
    4 ☐ other_____
    c. On the occasions when you don't find material, do you ask for assistance?
    1 ☐ usually 2 ☐ sometimes 3 ☐ no

19. a. Do you use other libraries for your research? 1 ☐ yes 2 ☐ no
    b. Which ones? 1 ☐ Univ. of Toledo 2 ☐ Univ. of Michigan
    3 ☐ Ohio State 4 ☐ other_____
    c. How often? 1 ☐ once every two weeks or more 2 ☐ once a month
    3 ☐ once or twice a semester
    4 ☐ once a year or less frequently
    d. Why do you usually make use of another library?
    1 ☐ better collection in my subject area
    2 ☐ other_____
    e. For what types of materials?_____

20. Do you generally find that the BGSU libraries have
    a. the most current books for research in your field?
    1 ☐ yes 2 ☐ no
    b. the journals you need? 1 ☐ yes 2 ☐ no

21. In which subject areas have you had difficulty locating materials in BGSU libraries?

    _____

    _____

22. a. Approximately how many items have you requested through Interlibrary Loan over the past year?
    1 ☐ 0 2 ☐ 1-5 3 ☐ 6-10 4 ☐ 11-20 5 ☐ 21+
    b. For which of the following
    1 ☐ coursework 2 ☐ thesis/dissertation
    c. About how many items have you wanted but never requested?
    1 ☐ 0 2 ☐ 1-5 3 ☐ 6-10 4 ☐ 11+
    d. Why didn't you request? 1 ☐ time 2 ☐ money
    3 ☐ unaware of service 4 ☐ 5 per week limit discouraged me

23. a. Have you had a computer database search done for you?
    1 ☐ yes 2 ☐ no
    b. If not, why not?
    1 ☐ don't know what it is
    2 ☐ don't know where to go to have a database search done
    3 ☐ too costly
    4 ☐ my instructors discourage this
    5 ☐ other_____
    c. Will your department reimburse any of the costs of a database search?
    1 ☐ yes 2 ☐ no 3 ☐ don't know

24. Have you ever had instruction or orientation in the use of any of the BGSU libraries?
    1 ☐ yes 2 ☐ no
    a. If yes, which of the following were most helpful in reducing time spent in looking for material you needed? (check and rank only the ones used: 1 = most helpful, etc.)

rank

_____ 1 ☐ library tour
_____ 2 ☐ guidebooks or handouts
_____ 3 ☐ presentation by librarian in a class
_____ 4 ☐ library assignment in a course
_____ 5 ☐ assistance at the reference desk
_____ 6 ☐ library seminar during graduate student orientation
_____ 7 ☐ other_____

25. What previous library research experience did you have before beginning your current graduate work? (check all that apply)
    1 ☐ little or no experience
    2 ☐ undergraduate courses which required papers
    3 ☐ independent study
    4 ☐ master's coursework
    5 ☐ master's thesis
    6 ☐ other_____

26. Have you used the following services:
    a. consultation with librarian/subject specialist about research in your field
       1 ☐ yes 2 ☐ no 3 ☐ unaware of service
    b. the Data Archive, the Libraries' collections on survey and numeric data stored on computer tape
       1 ☐ yes 2 ☐ no 3 ☐ unaware of service

27. How can the BGSU libraries further help you in your graduate work?

_____

_____

_____

V. DEMOGRAPHIC INFORMATION

28. Age ( ) 20-25 ( ) 26-30 ( ) 31-35 ( ) 36-40 ( ) 41-50 ( ) 51 +
29. Sex ( ) male ( ) female
30. Marital status: ( ) single ( ) married
31. Race/ethnic group: (optional)
    ( ) White ( ) Hispanic
    ( ) Black ( ) Native American
    ( ) Asian ( ) other_____
32. U.S. citizen ( ) yes ( ) no, I'm a citizen of_____ (country)
33. Where enrolled: ( ) Main Campus ( ) Firelands ( ) other_____
34. a. Are you employed? ( ) yes ( ) no
    b. If yes, check one of the following:
       ( ) research assistant
       ( ) teaching assistant
       ( ) work study job
       ( ) off-campus job
       ( ) internship
       ( ) other_____
35. Number of hours/week you are employed
    ( ) 0 ( ) 1-10 ( ) 11-20 ( ) 21-30 ( ) 31 +
36. Do you have a non-service fellowship? ( )yes ( ) no

Additional Comments:

Call the library and speak to the librarian/subject specialist about research in your field.

Survey form provided by Coleen Parmer of Bowling Green State University.
Prepared by Marilyn M. Parrish.

CORRECTIONAL CENTER LIBRARY

Help us provide the library materials and services that you need and want. Please return completed survey to the library no later than _____.

1. Why do you go to the library? Rank in order. Place 1 by the most important, 2 by the next, etc.

   ___ Pleasure reading
   ___ School assignments
   ___ Research/Legal section
   ___ Relaxation
   ___ Don't go to library
   ___ Other _____

2. Do you know how to find materials and information in this library?

   ___ Yes ___ No

3. How often do you go to the library?

   ___ Every day
   ___ 2 to 4 times a week
   ___ Once a week or less
   ___ Only when I have school assignments
   ___ Never go to library

4. What time of the day do you go to the library?

   ___ Mornings ___ Evenings ___ Afternoons ___ Saturdays only

5. How often do you read newspapers?

   ___ Every day
   ___ About once a week
   ___ Sundays only
   ___ A few times a week
   ___ Less than any of the above

6. What magazines to you like to read?

   ___ *Reader's Digest*
   ___ *Ebony, Jet*
   ___ News magazines
   ___ Business magazines
   ___ Men's magazines
   ___ Sports
   ___ Religious
   ___ Trade magazines like *Mechanics Illus.*
   ___ Other. Please name_____

7. If you have vision problems, would you use any of the following services?

   ___ Large print books
   ___ Large print magazines
   ___ Books recorded on records and tapes
   ___ Other, please list_____

8. People like to read different material. Check your favorite type of reading material. Check all that apply.

   ___ Paperback books
   ___ Hardback books
   ___ Comic books
   ___ Newspapers
   ___ Magazines
   ___ Fiction
   ___ Non-fiction
   ___ Other, please list_____

9. This library is for your use. Please list any comments about the library, services you would like or materials you would like to find in the library.

   _____

   _____

Source: Illinois River Correctional Center

To help improve library services at this institution, we would like you to fill out this short survey. Do not sign your name. Your answers will help us plan services and programs that meet your needs.

1. Do you go to the library? ____ Yes ____ No
   1a. If "yes" about how often? ____ 1-5 times per month ____ 6-10 times per month
   ____ 11-15 times per month ____ More often
   1b. If "no" why not? _____
   1c. Did you use libraries on the streets? ____ Often (at least monthly)
   ____ Seldom (3 or more times per year)
   ____ Never

2. How do you find material in the library when you use it? (Check the one most often used)

   ____ Card Catalog ____ Look through the shelves myself ____ Ask other inmates
   ____ Ask librarian/civilian staff ____ Other (explain)_____

3. What do you do in your spare time?_____

4. Of the following, check (5) that you are most interested in:

____ Westerns	____ Poetry	____ Sports	____ Computers
____ Romance	____ Travel	____ Hobbies	____ Adventure Stories
____ Crafts	____ History	____ Horror	____ Black Awareness
____ Science	____ Health	____ Business	____ Suspense
____ Sex Books	____ Religion	____ Mysteries	____ Politics
____ Career/Jobs	____ Short Stories	____ Georgraphy	____ Science Fiction
____ Sex Education	____ Spy/Intrigue	____ Sociology	____ Self-Improvement
____ Foreign Languages	____ Occult	____ Psychology	____ Biography
____ Ethnic Cultures	____ Law for Laymen	____ Philosophy	____ Fantasy
____ War	____ Art	____ Criminology	

5. What newspapers do you like to read? (limit 5)_____

_____

6. What magazines do you like to read? (limit 5)_____

_____

7. Check the kind of music you enjoy listening to the most:

____ County	____ Folk	____ Classical	____ Rock & Roll
____ Soul	____ Rhythm & Blues	____ Religious	____ Other (describe)
____ Jazz	____ Heavy Metal	____ Big Band	_____

8. If you have used the library at this institution where you satisfied with the service you received?
   ____ Yes ____ No
   8a. If "no" why not?_____

   _____

9. What suggestions do you have about the library?_____

   _____

   _____

Thank you for completing this survey. Your comments will help improve the Library.

Source: Pickaway Correctional Institution
Orient, OH

LIBRARY USER SATISFACTION SURVEY

The Library would appreciate your completing this questionnaire and returning it to the Library by _____. The purpose of the survey is to evaluate the quality of existing services, create new programs, and pinpoint areas where we can improve to meet your changing information needs. Your opinions are important to us. Please take a few minutes now to complete these pages and return to the Library. Thank you for you cooperation.

1. Please indicate your position title (partner, associate, paralegal, secretary, staff).

2. In your opinion, whom does the Library currently serve (check all appropriate).

   a) ____ Attorneys
   b) ____ Paralegals
   c) ____ Secretaries
   d) ____ Administrative Staff
   e) ____ Support Personnel
   f) ____ Office Assistants

3. Individuals use the Library for many reasons. For what purpose do you generally use the Library? (Please rank order the following, from 1 most often to least often.)

   a) ____ To retrieve cases and statutory materials
   b) ____ For in-depth research
   c) ____ To utilize Westlaw and Lexis for research
   d) ____ To seek reference aid from the Librarian and staff
   e) ____ For a candy snack in the late afternoon
   f) ____ For self-study or continuing education
   g) ____ To browse current materials
   h) ____ To socialize
   i) ____ Other (please specify) _____

4. How do you like to make your requests for information?

   a) ____ Telephone
   b) ____ Phone Mail
   c) ____ Electronic mail
   d) ____ In person
   e) ____ Inter-office mail
   f) ____ Other _____

5. How would you prefer to have your information requests delivered?

   a) ____ Telephone
   b) ____ Phone Mail
   c) ____ Electronic mail
   d) ____ Hand delivered
   e) ____ Inter-office mail
   f) ____ Pick up myself
   g) ____ Other _____

6. How would you rate the following Library services?

	Excellent	Good	Fair	Poor	Never Used
a) Circulation	____	____	____	____	____
b) Reference	____	____	____	____	____
c) Computer research	____	____	____	____	____
d) Routing service	____	____	____	____	____
e) Instructional workshops	____	____	____	____	____
f) Interlibrary loan	____	____	____	____	____
g) Orientation tours	____	____	____	____	____
h) Self service computers	____	____	____	____	____
i) Photocopying service	____	____	____	____	____
j) Cite checking	____	____	____	____	____
k) Book ordering	____	____	____	____	____
l) Meeting deadlines	____	____	____	____	____
m) Other (please specify) _____	____	____	____	____	____

7. How would you assess the adequacy of the Library in terms of the following?

	Better than Adequate	Adequate	Inadequate	Poor	Never Used
a) Books available to meet your needs	____	____	____	____	____
b) Computer search services	____	____	____	____	____
c) Courtesy of staff	____	____	____	____	____
d) Reference materials	____	____	____	____	____
e) Reliability of promised service	____	____	____	____	____
f) Staff's ability to obtain items not in the Library	____	____	____	____	____
g) Timeliness of service	____	____	____	____	____

8. What is your evaluation of the Library's current treatise collection?

a) ____ Fewer treatises should be purchased
b) ____ More treatises should be purchased
c) ____ Treatise collection is adequate at present size

If your answer was b, in what subject areas would you like additional treatises? _____

_____

9. What is your evaluation of the Library's current online resources?

a) ____ Fewer online resources should be available
b) ____ More online resources should be available
c) ____ Online resources are adequate at present availability

If your answer was b, in what areas would you like additional resources? _____

_____

10. Have you ever been unable to continue or complete your research because an item was off the shelf and not checked out?

a) ____ Never
b) ____ Yes

If your answer was b, please describe how often this has happened and if you use an alternate source to locate the information. _____

_____

_____

11. Please rank the overall performance of the Library in providing the information you need to serve the clients.

____Excellent ____Good ____Fair ____Poor Not used

12. How often do you use the Library?

a) ____ Daily
b) ____ Weekly
c) ____ Monthly
d) ____ Less than once a month
e) ____ Never, please give reason

_____

_____

13. Over the last year, how has your use of the Library changed?

    a) ____ Increased
    b) ____ Decreased
    c) ____ Remained the same

14. What time of day do you find most convenient to use the Library?

    a) ____ morning
    b) ____ afternoon
    c) ____ outside of normal business hours

    If you check c, please explain when and why you use the Library outside normal business hours.

    _____

    _____

    _____

15. Do you feel welcome to use the Library?

    a) ____ Yes
    b) ____ No. If not, please give reasons: _____

    _____

16. Please list any problems you have had with library service (whether or not there may be a solution).

    _____

    _____

    _____

17. Please feel free to provide any additional comments or suggestions.

    _____

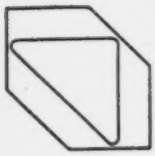
    _____

Thank you for your time and help in improving our library.

Anne K. Abate
Dinsmore & Shohl
Cincinnati
June 1992

Northeastern Ohio
Universities
COLLEGE OF MEDICINE

EXHIBIT 15-A



4209 State Rt. 44 P.O. Box 95
Rootstown, Ohio 44272 Phone: 216-325-2511

January 3, 1990

Dear Clinical Faculty Member:

The medical libraries of NEOUCOM and its associated hospitals are developing an automated information network to serve the students, faculty, and staff of NEOUCOM and the associated hospitals. This network will provide access to all the information resources of the libraries in one electronic "package". We hope also to provide other information resources on this network as determined by the results of the attached survey.

By completing this short survey, you will help us determine which applications and features you would like to see included on this network. We hope to apply for grant funding to help us reach our goal. Please return the questionnaire in the enclosed self-addressed envelope by January 19, 1990.

Thank you very much for your participation. If you have any questions about the survey, call (216) 325-2511, ext. 542.

Sincerely,

Jean Sayre

Jean Sayre
Director and Chief Medical Librarian
Northeastern Ohio Universities College of Medicine

And the librarians of NEOUCOM Associated Hospitals:

Akron City Hospital
Akron General Medical Center
Aultman Hospital
Barberton Citizens Hospital
Children's Hospital
Fallsview Psychiatric Hospital
Northside Medical Center
Robinson Memorial Hospital
St. Elizabeth Hospital
St. Thomas Medical Center
Southside Medical Center
Timken Mercy Medical Center
Trumbull Memorial Hospital
Woodside Receiving Hospital

JS:mm

enclosures

PLEASE RETURN TO: Jean Sayre, Director
Ocasek Information Center
NE OH Univ Coll of Medicine
4209 SR 44, P.O. Box 95
Rootstown, OH 44272

NEOUCOM CLINICAL FACULTY QUESTIONNAIRE

1. PLEASE LIST YOUR MEDICAL SPECIALTY: _____

Board Certified: _____Yes _____No

2. WHAT TYPE OF PRACTICE DO YOU HAVE? CHECK ONE.

_____ Individual
_____ Partnership
_____ Group Practice
_____ Salaried (organization)

3. CHECK THE LOCATION(S) OF THE MEDICAL FACILITIES WITH WHICH YOU ARE AFFILIATED:

_____ Akron Area
_____ Canton Area
_____ Youngstown Area
_____ NEOUCOM
_____ Cleveland Area
_____ Other Ohio Area

_____ Other (explain) _____

4. WHICH OF THE FOLLOWING BEST DESCRIBES YOUR PROFESSIONAL STATUS? CHECK ONE.

_____ Full-Time
_____ Retired
_____ Part-Time or Semi-Retired

5. WHICH INFORMATION SOURCES DO YOU USE IN YOUR MEDICAL PRACTICE? CHECK ALL THAT APPLY.

_____ Textbooks
_____ Journals
_____ Audiotapes
_____ Videotapes
_____ Online Databases (e.g., MEDLINE, AMANET, etc.)
_____ Computer Software
_____ Colleagues
_____ Educational Conferences
_____ Your Own Research Data
_____ Pharmaceutical Representatives
_____ Medical Records
_____ Laboratory Reports

_____ Other (explain) _____

EXHIBIT 15-A

6. SELECT THE 3 INFORMATION SOURCES YOU USE MOST IN YOUR MEDICAL PRACTICE.

_____ Textbooks
_____ Journals
_____ Audiotapes
_____ Videotapes
_____ Online Databases (e.g., MEDLINE, AMANET, etc.)
_____ Computer Software
_____ Colleagues
_____ Educational Conferences
_____ Your Own Research Data
_____ Pharmaceutical Representatives
_____ Medical Records
_____ Laboratory Reports

_____ Other (explain) _____

7. HOW DO YOU USE THE INFORMATION SOURCES YOU SELECTED IN QUESTIONS 5 AND 6? CHECK ALL THAT APPLY.

_____ Treat Patients
_____ Learn New Techniques
_____ Research
_____ Teaching
_____ Prepare Reports
_____ Practice Management
_____ Continuing Medical Education
_____ Recertification
_____ Current Awareness

_____ Other (explain) _____

8. HOW OFTEN DO YOU USE INFORMATION SOURCES IN YOUR WORK? CHECK ONE.

_____ Daily
_____ Weekly
_____ Monthly
_____ Seldom
_____ Never

9. HOW QUICKLY DO YOU USUALLY REQUIRE AN INFORMATION SOURCE? CHECK ONE.

_____ Immediately
_____ Same Day
_____ Within 24 Hours
_____ One Week
_____ Not At All

10. WHAT ARE THE BARRIERS, IF ANY, TO USING INFORMATION SOURCES? CHECK ALL THAT APPLY.

_____ Not Accessible
_____ Too Expensive
_____ Too Busy
_____ Don't know what to use
_____ Don't know how to obtain
_____ None

_____ Other (explain) _____

over →

11. WHERE DO YOU DO MOST OF YOUR INFORMATION RESEARCH? CHECK ONE.

_____ Office
_____ Home
Hospital Library:
_____ by phone
_____ in person

NEOUCOM Library:
_____ by phone
_____ in person

_____ Not Applicable

_____ Other (explain) _____

12. WHICH INFORMATION SOURCES DO YOU SUBSCRIBE TO OR PURCHASE ANNUALLY? CHECK ALL THAT APPLY.

_____ Journals
_____ Textbooks
_____ Audiotapes

_____ Videotapes
_____ Online Database Services
_____ Computer Software
_____ None

_____ Other (explain) _____

13. WHAT IS YOUR APPROXIMATE ANNUAL COST FOR PURCHASING INFORMATION SOURCES (INCLUDING JOURNAL AND TAPE SUBSCRIPTIONS, DATABASE CONNECT TIME, SOFTWARE, ETC.)? CHECK ONE.

_____ Under $100
_____ $100-500
_____ $500-1000

_____ $1000-5000
_____ Over $5000

14. HOW DO YOU USUALLY LEARN ABOUT CONTINUING MEDICAL EDUCATION OPPORTUNITIES? CHECK ALL THAT APPLY.

_____ Journals
_____ Hospital Announcements
_____ Mailing Lists

_____ Colleagues
_____ Membership Newsletters
_____ At Continuing Education Conferences

15. DO YOU PERSONALLY USE A COMPUTER? _____Yes _____No

16. IF YOU PERSONALLY DO NOT USE A COMPUTER, WHY? CHECK ALL THAT APPLY.

_____ Too Expensive
_____ Too Busy
_____ Never learned how

_____ Need Training
_____ I don't need one
_____ Not Applicable

17. HOW OFTEN HAVE YOU PERSONALLY USED A COMPUTER DURING THE PAST YEAR? CHECK ONE.

_____ Daily
_____ Weekly
_____ Monthly

_____ Seldom
_____ Never

18. HOW IS A COMPUTER USED IN YOUR MEDICAL PRACTICE? CHECK ALL THAT APPLY.

_____ Clinical Decision Making
_____ Case Studies
_____ Search the Literature
_____ Electronic Mail
_____ Medical Records
_____ Report Preparation

_____ Practice Management (billing, scheduling, insurance, etc.)
_____ Word Processing
_____ Spreadsheet
_____ Not Applicable

_____ Other (explain) _____

19. IF YOU DO NOT USE A COMPUTER IN YOUR MEDICAL PRACTICE, DO YOU PLAN TO PURCHASE ONE IN THE NEAR FUTURE?

_____Yes _____No _____Undecided

20. HOW USEFUL WOULD IT BE TO YOU TO ACCESS NEOUCOM AND THE NEOUCOM ASSOCIATED HOSPITAL LIBRARIES ELECTRONICALLY? CHECK ONE.

_____ Extremely
_____ Moderately

_____ Somewhat
_____ Undecided

21. WHAT WOULD YOU LIKE AN ELECTRONIC NETWORK OF NEOUCOM AND THE ASSOCIATED HOSPITAL LIBRARIES TO ENABLE YOU TO DO? CHECK ALL THAT APPLY.

_____ Locate a particular textbook or journal
_____ Access MEDLINE
_____ Access other databases, e.g., AMANET
_____ Access public information, e.g., FREENET
_____ Borrow books, journals, audiovisuals, etc.
_____ Transmit messages to colleagues, medical students, and the libraries
_____ Access to commonly used software programs
_____ Access a list of CE courses available in N.E. Ohio
_____ Patient referral
_____ Solve clinical problems
_____ Drug information

_____ Other (explain) _____

22. COMMENTS:

_____
_____
_____

THANK YOU!

EXHIBIT 15-A

EXHIBIT 15-A

1989	Vendor Contract signed for a centralized integrated library system, located at NEOUCOM
1990	NEOUCOM clinical faculty needs assessment survey developed and conducted
1990	Plans to implement "NeoMedNet", a central medical information resource for NEOUCOM students, staff and faculty, and staff of the associated hospitals
1991	Installation of integrated library system software and database, and installation of the Plusnet 2 Medline system at NEOUCOM
1991	Host of the Midwest Chapter/Medical Library Association Annual Conference, Cuyahoga Falls, Ohio

3.2 PLANS FOR NEOMedNet

In 1989, after extensive research into integrated automated library systems, the decision was made to purchase the TECHLIBplus system from Information Dimensions, a subsidiary of Battelle Memorial Institute, Columbus, Ohio. As work on the installation of the centralized system began, the Council also considered offering access to the library system and other medical information resources to students, clinical faculty, and members of the hospital staff of the 14 institutions. To determine the need and interest for such access, the Council issued a survey to the 1,296 NEOUCOM clinical faculty members in January 1990. (See Appendix C.) Five hundred fifty-nine surveys (43.1%) were returned. The results are summarized below:

Of those replying to the survey, the following characteristics of the respondents were revealed:

- 95.5% are full-time physicians
- 51% represent primary care specialties: OB/GYN, Family Practice, Internal Medicine, Pediatrics and Surgery
- 93.0% are board certified
- 90.7% practice in the 5-county NEOUCOM regional area

In response to how they use information sources, the physicians reported:

- 92.8% use information sources for patient care
- 78% use information sources for teaching, learning new techniques or CME
- 66.4% use information sources daily and 29.6% use them at least weekly
- 74.3% require information immediately or within 24 hours

In response to the question how and if they use computers, the physicians reported:

- 52.1% personally use a computer
- 48.9% use computers daily or weekly
- 36.1% use online databases in their practice
- 67.4% never learned to use a computer or need training
- 10.6% subscribe to online database services
- 32.7% use computers for literature searching or electronic mail
- 65.3% are either undecided or plan to purchase a computer in the near future

79.5% of the physicians responded that it would be useful to be able to access NEOUCOM and the associated hospitals electronically. When asked what they would like the system to do for them, they responded:

- 73.6% want to locate a textbook or journal
- 67.3% want to access Medline
- 50.1% want to borrow books and journals
- 44.6% want to access other databases

Based on the survey answers and comments, the following conclusions were made:

- Experienced end users desire more cost effective alternatives to electronic information access, and low-cost or no-cost telephone access

- NEOUCOM clinical faculty want unlimited access to Medline and other database services

EXHIBIT 15-A

- Respondents want full text retrieval and fast turnaround document delivery
- Physicians inexperienced with using computers want database and system training
- Respondents would like 24-hour access from their homes or offices

Because the survey results documented the interest of the clinical faculty towards establishing a NEOUCOM electronic information system, the Council proceeded to plan for an expanded network. On April 17, 1990, a committee of the Council met to determine network priorities and establish goals for the network. Keeping in mind the priorities established by the clinical faculty in the survey mentioned above, the librarians established the following system priorities using the nominal group method:

1. Toll free or low-cost access.
2. Free and unlimited access to Medline.
3. Immediate document delivery.
4. Access to other commonly used databases, i.e., CINAHL, PSYC, business databases.
5. Gateway to other online catalogs, databases, networks.

Appendix D outlines the full list of system priorities.

The committee met again on May 16, 1990, to further define the system and talk about governance, publicity, and evaluation issues (See Appendix E). In June 1990, the NEOUCOM administration announced that it had received substantial educational equipment monies from the state of Ohio. To receive these monies, a NEOUCOM department had to "apply" to a committee which determined how the money should be spent. The Council Chair, in consultation with other Council librarians, decided to apply for money to install the Plusnet 2 Medline system as part of NEOMedNet. Plusnet 2 is a new Medline search system which allows simultaneous access for up to 20 users and takes advantage of data compression technology to reduce the Medline database to 5 gigabytes of magnetic storage. This turnkey system was selected over the traditional tape load system, because it provided access to the entire Medline database, it was cheaper than buying VAX disk drives for storage of the database, and because it is easy to update (See Appendix F). The Council was granted $159,000, and the system, supporting 8 simultaneous users, was installed in January 1991. Online access to the system began in a test mode for the hospital librarians in April 1991.

A gateway to other online catalogs, databases, and networks was achieved during 1990. As the NEOUCOM connection to the Internet became operational, Council librarians began to learn how to use this valuable resource.

The NEOMedNet has been carefully planned and outlined. Some progress has been made toward fulfilling the goals the Council set for the system. However, several challenges remain, among them low-cost telecommunications access, immediate document delivery for all clients of the NEOUCOM consortium, and access to other commonly used databases.

D. DESIGN AND METHODS

The project design is centered around the achievement of the goals and aims of the NEOMedNet proposal.

Goal 1. To develop an effective electronic information and communications system that will enhance the accessibility of information resources and strengthen the network of NEOUCOM and its associated institutions.

In order to accomplish this goal, three aims must be met. The tasks to accomplish the aims are outlined below:

Aim 1a. To connect the NEOUCOM consortium hospitals to medical information resources and library services by establishing a cost-effective, reliable telecommunications link from anywhere in the five-county consortium region to NEOMedNet.

Historically, telecommunications has been a problem for the Council. Access to "Neocat", the online catalog for the Council, has been limited in the past due to long distance charges. To the Council members, faculty, and staff of the Council hospitals, it is increasingly important to have unlimited access to NEOMedNet resources and also gain the use of the Ohio Academic Resources Network (OARnet) (See Appendix G). OARnet connects users to Internet resources and in the future will connect to OhioLINK.

Source: Northeastern Ohio Universities College of Medicine

Auburn Memorial Hospital
Quality Assurance Study: Professional Library Services

The following is a Quality Assurance survey on the Medical Library. Please return the completed form by May 20 to Mrs. Barber or the Medical Library.

1. Have you requested information from the Library in the past year? [ ] Yes [ ] No
   (If yes, continue to Q2. If no, skip to Q8.)

2. Quality of the information:

   Was it relevant to your information needs? [ ] Yes [ ] No [ ] N/A
   Was it accurate and current? [ ] Yes [ ] No [ ] N/A

3. Cognitive value - contribution to your knowledge:

   Did it refresh memory of pertinent details/facts? [ ] Yes [ ] No [ ] N/A
   Did it substantiate prior knowledge or belief as foundation for clinical decision making? [ ] Yes [ ] No [ ] N/A
   Did you obtain new knowledge from the information? [ ] Yes [ ] No [ ] N/A

4. General impact of the information of the quality on patient care:

   Was the information of clinical value? [ ] Yes [ ] No [ ] N/A
   Did it lead to better-informed clinical decision? [ ] Yes [ ] No [ ] N/A
   Did it contribute to higher quality patient care? [ ] Yes [ ] No [ ] N/A

5. Impact of the information on case management:

   Did you handle the case differently as a result? [ ] Yes [ ] No [ ] N/A

6. Library performance in providing the information:

   Was the information provided quickly enough to be of value for clinical decision making? [ ] Yes [ ] No [ ] N/A
   Did Library staff demonstrate the knowledge required to meet clinical information needs? [ ] Yes [ ] No [ ] N/A
   Was Library staff cooperative in relationship with health professional? [ ] Yes [ ] No [ ] N/A

7. What was the overall performance of the Library in providing information-on-demand for patient care?

   [ ] excellent [ ] good [ ] fair [ ] poor [ ] have not used Library

8. If you have not requested information from the library, in the past year, please tell us why.

COMMENTS?

Source: Anne C. Tomlin
Auburn Memorial Hospital
Auburn, New York 13021

May 1988

From MLA DocKit #2. Permission to use not required.

EXHIBIT 15-C

UNM MEDICAL CENTER LIBRARY FACULTY SURVEY

1. Please indicate your specialty and rate the following library collections in your field: (circle N/A if unfamiliar with specific collection)

   Specialty or Department_____

	Excellent				Poor	
Monographs	5	4	3	2	1	N/A
Journals	5	4	3	2	1	N/A
Media	5	4	3	2	1	N/A
Reference	5	4	3	2	1	N/A

2. What would you like to see added to these collections?

   _____

   _____

   _____

3. Please rate the following library services. (circle N/A if you have had no contact with a particular service.)

		Excellent				Poor	
A	Circulation	5	4	3	2	1	N/A
B	Collection Development	5	4	3	2	1	N/A
C	Interlibrary Loan	5	4	3	2	1	N/A
D	Media	5	4	3	2	1	N/A
E	Online Searches	5	4	3	2	1	N/A
F	Reference/Information	5	4	3	2	1	N/A
G	Reserves	5	4	3	2	1	N/A

4. Please rate the willingness of the library staff to help you with your library needs.

   5 4 3 2 1

   Your comments:_____

   _____

   _____

Continue on Page 2

EXHIBIT 15-C

Faculty Survey (2)

5. Please rate how often you personally come to the library.

Frequently				Rarely
5	4	3	2	1

6. Who else uses the library for you?

	Frequently				Never
Secretary	5	4	3	2	1
Research Assistant	5	4	3	2	1
Student Assistant	5	4	3	2	1
House Officer	5	4	3	2	1
Other_____	5	4	3	2	1

7. Has anyone who uses the library for you attended the seminar on library and information skills taught three times a year by Medical Center Library staff?

_____ yes _____ no

8. Have you ever made suggestions to a member of the Medical Center Library staff on the following:

Services_____
Books _____
Journals_____
Hours _____
Other (please specify)_____

If so, what happened?_____

_____

9. Please circle the overall grade you would give the Medical Center Library.

A B C D F

10. Would you be willing to discuss the library's resources and services with a member of the library staff?

____ yes ____ no

If yes, please give us your name and phone number.

Name_____

Telephone Extension_____

Thank you for your help.

Please fold, staple and return your completed questionnaire by _____

Source: University of New Mexico
Medical Center Library
MLA Dockit#2

Permission to use not required.

READING HOSPITAL & MEDICAL CENTER
MEDICAL LIBRARY

SUGGESTION OR COMPLAINT
(Compliments, too, are accepted)

_____

_____

_____

_____

_____

_____

_____

Name (Optional) _____ Date _____

FOLD

- -

LIBRARY REPLY

_____

_____

_____

_____

_____

_____

_____

Name _____ Date _____

Replies will be posted on the bulletin board.

Source: Medical College of Pennsylvania
Philadelphia & Reading
MLA Dockit #2

Permission to use not required.

How to Start a Genealogy & Local History Department

In many public libraries today, specialty departments are being introduced in order to generate interest among patrons. One of the most interesting of these, already implemented in many libraries, is a genealogy and local history department. Not only is this an excellent way to niche-market, but it also encourages interest in other departments and resources. The Greene County Public Library provides their patrons with a genealogy guide sheet, as well as an outlined lineage chart, helping the user to cut down on the drafting of sources and allowing them to focus strictly on the task itself. Julie M. Overton, Coordinator of Local History at the Greene County Public Library has contributed a step-by-step overview of how to set up a genealogy and local history department. She has also provided tips and suggestions on how to "network" this system.

An important and overlooked area that is a fundamental source of patron interest as well as an effective soliciting tool for local and national businesses is a local history and genealogy department within a library. The need for historical information about local events or personalities is increasing, and is closely related to the tremendous expansion, during the last several years, of a strong interest in genealogical research. The Ohio Genealogical Society currently has over 95 chapters within the state (as well as several out-of-state chapters), covering most of the 88 counties in Ohio. The Ohio scene is particularly strong in terms of its residents' needs for a local history/genealogical department.

While the state organization has over 6,000 members, each chapter within the state has their own membership of anywhere from 150-600 people. Each of these groups meets once a month, with a lecture presentation on a variety of topics such as new publications, hands-on demonstrations or techniques, or an overview of a particular library's genealogical and historical holdings.

Patrons who come to a public library to use a local historical and genealogical collection often become actively involved in other departments within the library. The Inter-Library Loan facility is tapped if the patron locates the citation for a book not locally available. Spouses and children of researchers often spend their time in other areas of the library while waiting for the historian to use the research materials. Supportive reference materials held in other departments are apt to be consulted, and will be used even more if the overall library has a computer catalog, since the latter usually incorporates all resources and cites within the system. To those who keep statistics, the local historian or genealogical patron often gets a library card and borrows books in other departments during their visit.

The potential attraction of a local history and genealogy division for commercial users has far-reaching appeal. Potential users include the Chamber of Commerce, environmental researchers looking for data on past uses of buildings and building sites, and local businesses looking for historical photographs for display at special events.

Setting Up a Local History/Genealogy Department

Beginning a local and genealogical collection doesn't take too much know-how, but there is one underlying consideration to take note of. Do not give in to the temptation to make the collection "purely" historical or "purely" genealogical. The two topics are both facets of the overall field of local history and genealogy, and should not be considered as separate areas, especially within a library setting when personnel and/or space is a consideration. You need genealogical/family data in order to successfully research the history of a local business; and you need historical information in order to put a local family into perspective.

Several steps you can take to get a collection started include:

1. Appoint one or two staff members to be "in charge" of the collection; that will reduce the reference load for the majority of your staff, and at the same time allow the appointed staff members to become more familiar with the materials already owned, and to know what items to acquire. It also allows patrons to become familiar with one or two staff members in a more focused manner and conveys the message to your patrons that you are genuinely interested in promoting the new collection.

2. Contact your local genealogical society/chapter and historical society for advice and cooperation. (NOTE: The Ohio Genealogical Society, P.O. Box 2625, Mansfield, OH 44906 has the name and mailing address for all their chapters.)

3. Discuss the special cataloguing procedures that may be necessary in order to make the collection as "self-service" an operation as possible. There is currently no good classification system for a local history and genealogy collection, so some modification of your current system may be desirable.

4. Purchase basic genealogical and historical reference works, including "how-to" books for both historical and genealogical research, basic indexes, and any local published materials pertinent to the collection.

5. Set up an indexing system that will enable patrons to have access to their research topic in a more efficient and complete manner than normal processing procedures may allow for.

6. Locate microfilm equipment and cabinets for the new collection in or near the area.

7. Capitalize on the special interests of a local person or group (railroads, or Civil War, for instance) and work with them to develop your own collections.

In addition, the donation of materials can be a very effective way of garnering support. Many people have materials they would like to see preserved, especially if it is a compilation or book they have written. As long as the library issues the caveat that they (the library) reserve the right to dispose of the materials if it is not appropriate to the collections, patrons are more than willing to donate materials - many just want to make sure that a knowledgeable person evaluated their treasures before the material gets thrown away.

Public Relations

Once the collection is "ready to go," the marketing of the collection can begin. However, since the collection is a specialized one, with a communication structure often in place, there are some special ways to publicize the collection that ordinarily might not be possible.

1. Use the grapevine: mention to all and sundry that the collection is available and invite them to come and browse.

2. Develop an overview sheet that details the basics (hours, location, etc.) and a statement of the scope of the collection. Add special notes about special items of potential interest (photographs, diaries, newspapers, census etc.). Don't forget to mention copying and microfilm capabilities.

3. Talk to the local newspaper about "the new collection," and about a continuing series on local history and genealogy. Often, local historians might be willing to write articles; these articles can even be alternated with articles dealing with information about other departments.

4. Develop hand-outs that detail particular aspects of the collection. A good way to identify topics for the hand-outs is to make them answer frequently-asked questions, such as "how old is my home," or "how do I start my genealogy."

5. Have your designated staff member attend area meetings, and when possible, ask them to tell about the new collection, or about changes in hours, or about a new book received. The more times someone mentions the collection, the more your potential patrons will remember that you are there!

6. Be in touch with area institutions so that duplication is avoided, that they are aware of what you have, and what your plans are for the collection.

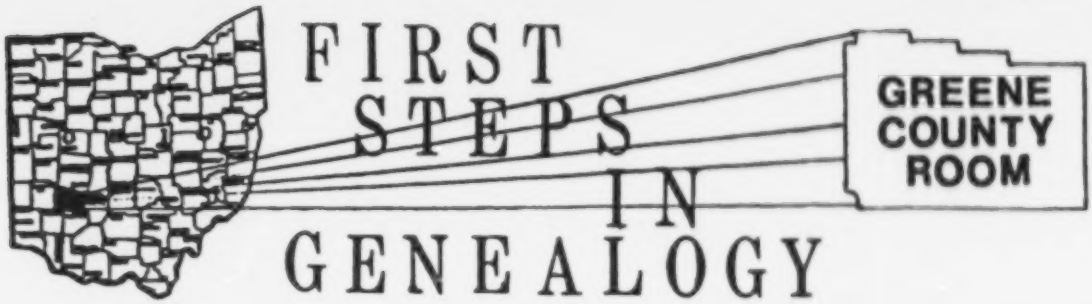
7. Enclose the overview of the collection hand-outs routinely when responding to written letters.

8. When sending out replies to letters, if you need to bill for copying fees, make your "bill" include other possible ways the mail patron can help out - with special donations of materials and manuscripts, or with earmarked monies.

An effective hand-out that generates public interest and awareness in genealogy, is the "First Steps in Genealogy" instruction sheet used by the Greene County Public Library. This takes the patron through an easy-to-follow, 5-step course on the most useful ways to collect data, as well as suggestions on how to talk with significant family members.

The Greene County Public Library also distributes a genealogy outline that allows the patron to fill-in the major divisions of their family's history. This hand-out is most useful when documenting genealogy as it saves time and effort for the patron. (Copies of these hand-outs follow).

Source: Greene County Public Library
Xenia, Ohio



THE FIRST RULE OF GENEALOGY: START WITH YOURSELF AND WORK BACK

Step 1: Talk to parents, grandparents, great-grandparents, aunts, uncles, or anyone else in the family circle who is older than you are. Ask questions such as:

a. What is your full name?
b. When and where were you born? Where did you grow up?
c. When and where were you married?
d. Whom did your marry? What is their full name?
e. How many children did you have? What are their names?
f. What were your parents' full name? When and where were they born? Where did they grow up? When and where did they marry?
g. What do you know about your grandparents?
h. Do you have any family Bibles, papers or family photographs?

Suggestion: Tape record the people you talk to as well as writing down their answers; keep the tapes. Do not forget to first ask permission to tape them.

Step 2: Begin to fill in a genealogy chart like the one on the reverse of this sheet. Fill in as many birth, marriage and death dates as you can. If you do not have exact dates, pencil in the approximate dates.

Suggestion: Use pencils with erasers for preliminary work. Always use letters to indicate months. Write all surnames in all capital letters. Use the maiden name of your female ancestors on the sheets.

Step 3: Begin reading a book about doing genealogy. These "how-to" books will tell you about may sources of information for genealogical research. The library does have circulating copies of some of these if you do not wish to purchase one.

Step 4: Begin collecting copies of death and birth certificates, and marriage licenses. This step will involve money because all states charge for their copies. You will need to know the approximate date and the proper state and county. These records may give you information about the person and often about their parents.

Step 5: Visit the Greene Co. Room at the Green Co. Public Library; use the extensive book and microfilm collection. Ask for help with snarls. Our books do not circulate and must be used in the Green Co. Room. We are open Monday-Thursday 9-9, and Friday and Saturday from 9-5, and are always staffed.

GREENE COUNTY PUBLIC Library
GREENE COUNTY ROOM
76 E MARKET STREET • XENIA, OH 45385-3100
513 • 376 • 4952 FAX 513 • 372 • 4673

B = Birthdate
W = Where born
M = Marriage date
W = Where married
D = Death date
B = Where buried

Subject's name
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D
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Father's name
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Mother's name
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Grandfather's name
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Prepared by

Date

Sources (people who gave information; book title, page no.; court record location, etc.):

Courtesy of the Greene County Public Library, Xenia, Ohio

OHIO WESLEYAN UNIVERSITY
GOVERNMENT PUBLICATIONS DEPARTMENT
PUBLIC AWARENESS/COMMUNITY OUTREACH PLAN

I. BACKGROUND

The Federal Depository Library System was established in the early 1800's to provide the citizens of the United States with access to government information. This Congressional action recognized the fact that an informed public is a vital part of a democratic government, and accepted a significant burden for providing that information on the federal government.

The report from our GPO inspection of May 17, 1990, showed us deficient in the area of public service, specifically urging us to do more outreach to the surrounding community and to target the general public for a promotional effort. The inspector asked that examples of *proactive outreach into the community* be provided. This mandate from the Superintendent of Documents, combined with library goals of service, and university goals of positive relationships with the Delaware and Ohio Wesleyan communities, have provided impetus for a well-planned and executed public awareness and community outreach plan.

II. PLAN

Target Audiences

1) Ohio Wesleyan library staff
   a) reference librarians
   b) government publications staff
   c) public service personnel, including student assistants
   d) all other staff

2) library staffs in surrounding area
   a) Delaware County District Library & branches
   b) Delaware County Law Library
   c) Sunbury Community Library
   d) Ashley Community Library
   e) Methodist Theological School Library
   f) high school library staffs

3) primary patrons - campus
   a) faculty
   b) students
   c) administration and staff
   d) other regular library users

4) general public
   a) government offices
   b) patrons of other libraries
   c) businesses
   d) lawyers
   e) teachers

5) depository community
   a) GPO inspectors
   b) nearby depositories
   c) OGODORT members
   d) other depositories

EXHIBIT 16-B

Goals

1. Increase awareness of the federal depository system.
2. Increase awareness of unique resources of Ohio Wesleyan's depository collection.
3. Enhance image of Ohio Wesleyan University libraries in community.
4. Enhance image and relationships between Ohio Wesleyan and local community.

III. METHODS

* Activities noted with an asterisk are special projects to be initiated, and either completed or become ongoing, by the end of FY 1991-92. Numbers in parentheses indicate the target audiences intended to be reached by each activity. Refer to **PART II. PLAN** for definition of target audiences.

Person Responsible	*Date/completion*	*Activity*
All	ongoing	staff orientations include depository (1)
Reference Coordinator	undetermined	*re-edit Beeghly depository pamphlet (1, 2, 3, 4)
Reference Coordinator Govt. Pub. Mgr.	initiate summer '91 ongoing	*Subj. Bibliographies at reference desk (1)
P.S. Staff Library Director	annually	new faculty packets include depository information (3)
Admin. Office	annually	admissions tour guides have depository info. (3)
B. I. Coordinator P.S. Librarians	ongoing	Bibliographic instruction includes depository pubs. (1, 3)
P.S. Librarians	as needed	create bibliographies with GPO publications (1, 3)
On-Line Coordinator	ongoing	maintain Marcive Index (1, 3)
Computer Specialist	ongoing	maintain dial access to LS/2000 to community (2, 3, 4)
Govt. Pub. Mgr. Head of Tech. Services	as needed, min. 2 per semester	Daily Bulletin blurbs (1, 3)
Govt. Pub. Mgr.	ongoing	cataloging selected govt. pubs. on LS/2000 (1, 2, 3, 4)
Govt. Pub. Mgr. Dept. Liaisons	as needed	occasional letters to interested persons for specific publications (1, 2, 3, 4)
Govt. Pub. Mgr.	ongoing	participation in Collection Development Group (1)
Govt. Pub. Mgr. P. S. Office Mgr.	ongoing	GPO pamphlets & bookmarks available in Beeghly ref. & docs areas (3)

III. METHODS (Continued)

Person Responsible	*Date/completion*	*Activity*
Govt. Pub. Mgr. P. S. Staff	ongoing	maintain GPO depository signs & decals in proper locations (1, 2, 3, 4)
Govt. Pub. Mgr. with O.W.U. PR Dept.	as needed	submit press releases to local media (campus & external) for special events, special docs., etc. (1, 2, 3, 4)
Govt. Pub. Mgr. Cataloging Dept.	ongoing	route newly cataloged docs through new book shelf (1, 3)
Govt. Pub. Mgr. Reference Coordinator	undetermined	*staff training for GPO & collection awareness (1)
Govt. Pub. Mgr. Library Director	quarterly - small annually - major	*displays highlighting collection (1, 3)
Govt. Pub. Mgr. O.W.U. PR Dept.	fall '91	*Alumni mag. article (1, 3)
Govt. Pub. Mgr. Librarians	initiate 1991-2 ongoing	*become part of O.W.U. speakers bureau (1, 2, 4)
Govt. Pub. Mgr. P. S. Staff	ongoing	utilize GPO marketing materials, posters, pamphlets, signs, etc. (1, 2, 3, 4)
Govt. Pub. Mgr. P. S. Librarians	twice/year	*host community open house; one general, one specific topic (1, 2, 3, 4)
Govt. Pub. Mgr.	ongoing	cooperate with and utilize OGODORT awareness activities (1, 2, 3, 4, 5)
Govt. Pub. Mgr.	undetermined	contribute successful ideas or projects to *Admin. Notes* (1, 5)
Govt. Pub. Mgr.	ongoing	maintain records & clippings of outreach activities (1, 5)

IV. EVALUATION METHODS

In order to assess whether the chosen methods are effective, evaluation methods have been determined in advance. Methods selected are:

Total annual increase in circulation statistics.

Written evaluations after special events.

Anecdotal information from librarians and staff.

Maintain file of media coverage achieved.

Maintain record of plan and methods implemented to show inspector evidence of proactive outreach.

Produce annual report combining above information.

Improved ranking on next inspection relative to outreach activities.

V. CONCLUSION

A public awareness/community outreach plan for the Ohio Wesleyan federal depository collection should complement other public awareness/community outreach activities for the library system. Methods used and publications created should be part of other awareness and outreach activities undertaken by the OWU libraries. Although awareness and service to our primary users is extremely important to us, it must be remembered that the success of outreach activities is measured by the Superintendent of Documents by awareness in the general public. By accepting the benefits of our depository status, we assume the responsibilities of serving our congressional district and the guidelines set by the federal government. Implementation of this plan should bring us closer to meeting the intended goals for the depository library system.

Source: Julianne R. Houston
Beeghly Library, Government Publications Department
Ohio Wesleyan University

INSTRUCTIONAL MATERIALS REVIEW FORM

Item:

Catalog No:

Date Acquired:

Medium:

Appropriate Curriculum Area(s):

Appropriate Age/Grade:

Condition:

Quality Rating: (1 = high, 5 = low)

Accurate: _____ Up-to-date: _____

Bias-free:

Racial _____ Class _____

Sexual _____ Age _____

Religious _____

Interesting to children: _____

Other comments:

Special requirements for use:

Source: Mary L. Hoaglund, WRA

RESOURCE-BASED TEACHING/LEARNING

Changes in education have come rapidly in past decades with explosions of information and technology. The old ways of imparting and getting information have been joined by many new ways. The process of learning is as important to today's teachers as is the subject matter itself. The emphasis is on empowering students to master the methods of learning, rather than in memorizing facts and concepts. The goal is to empower students for lifelong learning, so that they can keep abreast of developments in an increasingly rapidly changing world.

Teachers today are more conscious of individual differences in learning style, rates of achievement, background, etc. Various kinds of groupings, from whole-class to independent study are used for instruction. These groupings are facilitated by use of the variety of media available today. Modern society has been transformed by technology such as tape and compact disk recorders, TV, calculators, computers, laser videodisks, etc. Students are accustomed to these technologies in their homes, generally enjoy using them, and often prefer them to the printed page or teacher lectures.

National guidelines for school library media programs describe three roles for school library media specialists. The first is the traditional, but now expanded, one of providing access to resources; second is providing integrated instruction to students in information skills; and third is to serve as instructional consultants to the classroom teachers in curriculum and lesson design. This third activity is what is referred to as resource-based teaching.

Most librarians carry out the first two of the activities listed above, but many feel uncomfortable in the role of instructional design consultant. They need help in finding the time, gaining the skills needed, cataloging their resources in terms of particular units of study, and in developing the relationships with teachers that will lead to partnerships in instructional planning.

The Minnesota Department of Education has developed basic strategies for library media specialists to help them get started in resource-based instructional design. Lists of activities for getting started and working with teachers, for finding more time, for working through others, for teaming with classroom teachers, assessing resources, refining the librarian's role in the instructional process, and self assessment of the librarian's performance in that role. Listed below is an annotated bibliography of books and articles describing resource-based teaching and the instructional consultant role and/or those which include actual units of resources integrated into the curriculum.

EXHIBIT 17-B

RESOURCE-BASED TEACHING, SELECTED BIBLIOGRAPHY

(Courtesy of Mary Dalbotten, Minnesota Department of Education)

Books

Butzow, Carol M. and John Butzow. *Science Through Children's Literature: An Integrated Approach*. Littleton, CO: Libraries Unlimited, 1989.

This activity-centered approach to elementary science features instructional units for more than 30 outstanding children's fiction books. Aimed at preschool through grade 3 teachers, this source book focuses on works that are rich in scientific concepts, yet are equally well known for their strong storylines and universal appeal. Chapters cover the whole language approach to teaching and emphasize its use in integrating all areas of the curriculum. Creating and using concept maps and webs explained.

Cleaver, Betty P., and William D. Taylor. *The Instructional Consultant Role of the School Library Media Specialist*. Chicago: American Library Association, 1989.

A revision of an earlier out-of-print work in the *Trends and Issues Series* titled "Involving the School Library Media Specialist in Curriculum Development." Two thrusts of this monograph are to expand the understanding of the instructional consultant role of the library media specialist and to give some practical suggestions on performing the role.

Eisenberg, Michael and Robert E. Berkowitz. *Curriculum Initiative: An Agenda and Strategy for Library Media Programs*. Norwood, NJ: Ablex, 1988.

Examines the changing relationship between the library media center program and the school's overall educational program; a systematic planning process called the Six-Stage Strategy; curriculum information collection; a library and information skills curriculum called the Big Six Skills; and planning for instruction with secondary and elementary integrated teaching units and lessons.

Haycock, Ken, ed. *The School Library Program in the Curriculum*. Littleton, CO: Libraries Unlimited, 1990.

These articles, originally published in *Emergency Librarian*, have been chosen for their insight and analysis of issues in integrating the school library program into the curriculum of the individual school. They cover research, the role of the teacher-librarian, program development, teaching information skills across the curriculum and continuing issues in the school library program.

Loertscher, David. *Taxonomies of the School Library Media Program*. Littleton, CO: Libraries Unlimited, 1989.

A taxonomy for each of four viewpoints (the library media specialist, the principal, the teacher and the student) covers four basic elements of service, including warehousing, direct services to students and teachers, resource-based teaching, and vertical program features. The author provides a step-by-step guide to the achievement of excellence by setting standards and expectations, including instruments for evaluation.

Into the Curriculum, Ed. by H. Thomas Walker and Paula K. Montgomery. ABC-CLIO, 1991.

Teach library media skills in the context of any curriculum subject with over 150 exciting projects selected from five years of the best ideas from "School Library Media Activities Monthly." Each activity includes media and curriculum objectives, instructional roles, activities, teaching aids, visuals, and evaluation methods. A so-so-index lists subject, subtopic, and library media skills.

Reaching Out: Cooperative Activities for the LMC and Art, P.E., Home Ec, Music, Health, and More. Littleton, CO: Libraries Unlimited, 1989.

"The purpose of this book is to assist library media specialists and teachers in implementing library media center-based instruction that accomplished both the objectives of the content areas of the library media program." The content areas featured are those usually considered elective or exploratory.

Seaver, Alice R. *Library Media Skills: Strategies for Instructing Primary Students*. Littleton, CO: Libraries Unlimited. 2nd ed. 1991.

Innovative strategies for introducing children to the wonders of the school media center and for developing the skills basic to using it effectively. Topics covered include grouping considerations for instruction, rewarding student achievements and accomplishments, literature enrichment and evaluation of learning.

Turner, Philip. *Helping Teachers Teach: A School Library Media Specialist's Role*. Littleton, CO: Libraries Unlimited, 1985.

Focuses on the increasingly important role school library media specialists can play in helping teachers design, implement, and evaluate classroom instruction. Practical suggestions are provided throughout to enable library media specialists to become actively involved instructional design consultants.

Van Vliet, Lucille W. *Media Skills for Middle Schools: Strategies for Library Media Specialists and Teachers*. Littleton, CO: Libraries Unlimited, 1984.

The lessons and sample instructional units found in this volume will assist in integration of library media skills with the classroom teaching process. Each sample lesson features an overview of the lesson, library media skills objectives, performance objectives, subject area, learning strategy, resources, guidelines for group discussions, methods, activities, and evaluation criteria.

Zlotnick, Barbara B. *Ready for Reference: Media Skills for Intermediate Students*. Littleton, CO: Libraries Unlimited, 1984.

This volume develops a research, study, and information skills program which integrates media skills instruction with subject skills instruction. It includes reproducible activity worksheets, pretests, and posttests, as well as developmental skills activities and teaching plans. Grades 3-6.

Journal Articles

Griffen, Donna J., and Jodi Lamb, "Positive Relationships Produce Positive Results," *School Library Journal* Vol. 34 No. 3, November, 1987: 27-39.

Haycock, Ken. "Strengthening the Foundations for Teacher-Librarianship," *School Library Media Quarterly* Vol. 13 No. 2, Spring, 1985: 102-109

Stripling, Barbara "What Price ID? A Practical Approach to a Personal Dilemma," *School Library Media Quarterly*, Summer, 1984, p. 290-96

Source: Mary L. Hoaglund, WRA
Mary Dalbotten, Minnesota Department of Education

TRI-VALLEY HIGH SCHOOL
Teacher Survey

_____
Teacher's Name

Magazines

Please list at least five magazines or newspapers which you feel would be of the greatest value to your subject area and/or grade level.

1. _____ 2. _____

3. _____ 4. _____

5. _____ 6. _____

See the list of magazines ordered last year (on back).

Research Projects

Are you planning to assign a project involving library investigation next year? _____

What Type? _____ Subject(s) _____

Material to be Purchased

Your suggestions for book and/or audiovisual material appropriate to your subject area would be greatly appreciated. Please be as specific as possible in describing the material (author, title, publisher, etc.). List these in order of suggested buying priority.

_____

_____

_____

_____

Specific subject area suggestions would also be welcome._____

_____

Audiovisual Equipment

What kinds of equipment do you use most often? _____

_____

What types of equipment would you most like purchased in the future?

_____

Return this form to the library or library mail slot in the office.

Source: Julie Link, Dresden, Ohio

Dayton And Montgomery County Public Library
LIBRARY SURVEY

We'd like to know what you think about the library. The survey will help us learn what we do well and where we could better meet your needs. Please take a few minutes and give us your ideas.
Please circle appropriate responses.

1. On the average, how many times a month do you come to the library?
   1. less than once a month
   2. 1 time
   3. 2 - 5 times
   4. 6 - 10 times
   5. more than 10 times

2. Do you ever visit a different library in our area?
   1. yes
   2. no

   If yes, which one(s)? _____

   _____

3. If you do visit another library, how often each month?
   1. less than once a month
   2. 1 time
   3. 2 - 5 times
   4. 6 - 10 times
   5. more than 10 times

4. What is the main reason you use the library? (mark one only)
   1. pleasure
   2. school
   3. work
   4. self-improvement
   5. other _____

5. Ordinarily, how do you use the library? (Circle as many as apply.)
   1. check out books
   2. find information
   3. use my own material in the library
   4. attend programs
   5. use copy machines
   6. browse
   7. check out audio-visual items

	Always	Often	Sometimes	Never
6. Do you usually find what you are looking for?	4	3	2	1
7. Is library staff courteous and helpful?	4	3	2	1
8. Is library staff knowledgeable?	4	3	2	1
9. Are library hours convenient?	4	3	2	1
10. Is the library easy to use?	4	3	2	1
11. Are you generally pleased with library service?	4	3	2	1

12. What materials do you need that the library doesn't have? _____

13. Do you usually come here from:
   1. home
   2. work
   3. school
   4. other _____

14. Do you usually combine a library visit with:
   1. shopping
   2. entertainment
   3. work
   4. I usually make a special trip here
   5. Other _____

15. Does parking influence your decision to visit the library?
   1. yes
   2. no

16. Have you ever used the Main Library on Sunday?
   1. yes
   2. no

17. What one improvement would make the library better for you?

18. What other comments or suggestions do you have on how we can make library service better for everyone in the community? (Use back if necessary.)

PLEASE TELL US ABOUT YOURSELF

19. zip code _____

20. Sex
    1. M
    2. F

21. Age
    1. 5 - 17
    2. 18 - 29
    3. 30 - 49
    4. 50 - 69
    5. 70+

22. Race
    1. Amer-indian
    2. Asian
    3. Black
    4. White
    5. Hispanic
    6. Other

23. Check one:
    1. Seeking employment
    2. Not employed
    3. Employed full-time
    4. Employed part-time
    5. Student
    6. Retired

THANK YOU!

Source: Dayton and Montgomery County Public Library

Form number _____

LIBRARY SURVEY

Library _____ Date _____

Please fill out this survey and return it as you leave.

We want to know if you find what you look for in our libraries. Please list below what you looked for today. Mark "YES" if you found it, and "NO" if you did not find it.

TITLE

If you are looking for a specific book, record, cassette, newspaper, or issue of a magazine, please write the title below, include any reserve material picked.

NAME OF WORK	FOUND? YES	FOUND? NO
(Example) *Gone with the Wind		
1.		
2.		
3.		
4.		
5.		

SUBJECT OR AUTHOR

If you are looking for materials or information on a particular subject or a special author today. Please note each subject or person below.

SUBJECT OR AUTHOR	DID YOU FIND SOMETHING? YES	DID YOU FIND SOMETHING? NO
(Examples) *How to repair a toaster *any book by John D. MacDonald		
1.		
2.		
3.		
4.		
5.		

BROWSING

If you were browsing and not looking for anything specific, did you find something of interest?

YES ____ NO ____

OTHER

____ Check here if your visit today did not include any of the above activities. (Example) using the photocopy machine.

COMMENTS

We would appreciate any comments on our service and collections on the back of this sheet.

THANK YOU

Source: Output Measures for Public Libraries - Second Edition, American Library Association. Permission to copy not required

WESTERVILLE PUBLIC LIBRARY
LIBRARY SURVEY

The Westerville Public Library is conducting a study in order to make better plans for the future. Please complete this questionnaire during your visit to the library and drop it in the container near the check-out desk on your way out. Your name is not necessary. Your help in supplying this information is much appreciated.

CHECK OR COMPLETE AS INDICATED

1. How often do you usually visit the Westerville Public Library?

_____ [1] this is my first visit
_____ [2] at least once a month
_____ [3] six to eleven times a year
_____ [4] one to five times a year

2. What is the single most important purpose for which you use the public library? CHECK ONE ONLY

_____ [1] for information or materials related to school
_____ [2] for information or materials related to job or career
_____ [3] for information related to personal interests or needs
_____ [4] to acquire reading materials for leisure time use
_____ [5] to acquire other materials, e.g., videos
_____ [6] something else (what) _____

3. Check in column 1 below the library services or collections you use. CHECK ALL THAT APPLY. For each of these, indicate whether you are very satisfied, satisfied, or not satisfied with the collection or service by checking column 2, 3, or 4.

[1] use service		[2] very satisfied	[3] satisfied	[4] not satisfied
_____	a. Adult fiction collection	_____	_____	_____
_____	b. Adult non-fiction collection	_____	_____	_____
_____	c. Juvenile fiction collection	_____	_____	_____
_____	d. Juvenile non-fiction collection	_____	_____	_____
_____	e. Magazine collection	_____	_____	_____
_____	f. Newspaper collection	_____	_____	_____
_____	g. Reference collection	_____	_____	_____
_____	h. Local history collection	_____	_____	_____
_____	i. A/V collection [videos, audio cassettes, etc]	_____	_____	_____
_____	j. Large Print book collection	_____	_____	_____
_____	k. Library programs/adult	_____	_____	_____
_____	l. Library programs/children	_____	_____	_____

_____ m. Apple computer & software	_____	_____	_____
_____ n. Equipment [copier, typewriter, etc)	_____	_____	_____
_____ o. Staff help [in person or by phone]	_____	_____	_____
_____ p. Business information	_____	_____	_____
_____ q. Art prints	_____	_____	_____
_____ r. Outreach services	_____	_____	_____
_____ s. Catalog system	_____	_____	_____
_____ t. Interlibrary loans	_____	_____	_____

_____ u. Other (what) _____

_____ v. Comments _____

_____

_____

4. [a] **Are you satisfied with current hours of operation at the library?**

_____[1] yes
_____[2] no

[b] **If not, what changes in hours would you like to have?**

_____[1] more morning hours
_____[2] more evening hours
_____[3] other (specify) _____

5. [a] **Do you think the Westerville Public Library needs branches or a bookmobile to make the library more convenient for you?**

_____[1] yes
_____[2] no
_____[3] don't know

[b] **If yes, how would you like to see a branch or mobile library services provided? CHECK <u>ONE</u> ONLY**

_____[1] bookmobile service (where) _____
_____[2] branch library (where)_____
_____[3] something else (what)_____

6. **Did you find the information or materials you wanted today?**

_____[1] yes
_____[2] no

7. [a] Did you ask the library staff for help in locating information or materials?

_____[1] yes
_____[2] no

[b] If not, was there any reason for not asking for help?

_____[1] found the material by myself
_____[2] didn't know I could ask
_____[3] everyone was busy
_____[4] was unsure of what to ask
_____[5] other (specify)_____

8. If the item you wanted was not available today

[a] Did you ask to have the item reserved for you?

_____[1] yes
_____[2] no

[b] Did you ask the librarian to borrow it for you from another library?

_____[1] yes
_____[2] no

9. [a] Do you use other libraries in addition to this one?

_____[1] yes
_____[2] no

[b] If yes, which ones? CHECK ALL THAT YOU USE

_____[1] Worthington Public Library
_____[2] Columbus Metropolitan Library
_____[3] another public library
_____[4] school library
_____[5] college library
_____[6] government library
_____[7] business or industrial library
_____[8] other (what kind)_____

10. Which of the following changes would most increase your satisfaction with the Westerville Public Library? CHECK NO MORE THAN THREE

_____[1] no change necessary
_____[2] new, more convenient locations of service
_____[3] bookmobile service
_____[4] more books for adults
_____[5] more books for teenagers
_____[6] more books for children
_____[7] more magazines & newspapers
_____[8] more audio cassettes
_____[9] more video cassettes
_____[10] more personal computers & printers to use
_____[11] better informational & reference services
_____[12] more staff available to provide services
_____[13] more programs for adults
_____[14] more programs for children
_____[15] more programs for teenagers
_____[16] more special services for aging, handicapped & homebound
_____[17] compact disks
_____[18] word processors
_____[19] more parking
_____[20] more copies of popular items
_____[21] something else (what)_____

11. If the library found it necessary to reduce services, what would you be most willing to give up? CHECK NO MORE THAN THREE

_____[1] reduce evening hours
_____[2] reduce morning hours
_____[3] reduce weekend hours
_____[4] reduce reference collections
_____[5] reduce number of book titles purchased for adults
_____[6] reduce number of book titles purchased for children
_____[7] reduce number of duplicate copies of popular materials purchased
_____[8] reduce number of cassettes and videos purchased
_____[9] reduce programs for adults
_____[10] reduce programs for children
_____[11] reduce special services for aging, homebound, handicapped & confined
_____[12] reduce information services
_____[13] other (what)_____

12. [a] Do you think you need to know more about Westerville Public Library to use it more effectively?

_____[1] yes
_____[2] no

[b] If yes, what would be most helpfulto you? CHECK ONE ONLY

_____[1] tours
_____[2] classes
_____[3] informational brochures
_____[4] announcements of events
_____[5] booklists & other lists of materials available on certain subjects
_____[6] other (what) _____

13. Do you know how the Westerville Public Library is funded?

_____[1] yes
_____[2] no
_____[3] unsure

14. What should be the major role of the Westerville Public Library?

_____

_____

15. What I like most about the Library is _____

_____

16. What I like least about the Library is _____

_____

17. Extra comments _____

_____

EXHIBIT APB-C

OPTIONAL

PERSONAL INFORMATION

A. How many years of school have you completed?

_____[1] 8 years or less
_____[2] some high school
_____[3] high school graduate
_____[4] some college
_____[5] college graduate
_____[6] graduate work

B. What is your age?

_____[1] less than 12 years old
_____[2] 12-19 years old
_____[3] 20-34 years old
_____[4] 35-59 years old
_____[5] 60 years or over

C. How long have you lived in the Westerville School District?

_____[1] less than 5 years
_____[2] 5-10 years
_____[3] 11-25 years
_____[4] more than 25 years
_____[5] all my life
_____[6] live outside school district

D. Name_____
(optional)

We welcome any criticisms, comments or suggestions that you might make for improving library services. If more space is needed, use the back of this form.

THANK YOU FOR COMPLETING THIS QUESTIONNAIRE!

Source: Westerville Public Library
Westerville, Ohio

LIBRARY AND NON-PROFIT MARKETING SELECTED BIBLIOGRAPHY

BOOKS

Barlow, Don W. ed. *Charting the Future: Westerville Public Library Long Range Plan for Library Services and Development*. Westerville [OH] Public Library, 1991.

This long range plan provides a statement of the current level of services and an action plan for the initiation or improvement of services over the next five years.

Breen, George E. and Albert B. Blankenship. *Do-It-Yourself Marketing Research*. New York: McGraw-Hill, Inc., 1989.

Simple, direct book with samples of customer surveys, etc.

Bunge, Charles A. *Professional Education and Reference Efficiency*. Springfield, Illinois. Illinois State Library, 1967.

A study designed to gather and examine data on the relationship between formal library education and effectiveness in answering reference questions. Reference staff members were asked a set of test questions and were observed while they attempted to find answers. A series of conclusions and recommendations for understanding the factors that influence reference work is useful.

Corbus, Lawrence J. and Richard G. Sheridan. *Allocating Library Funds within Counties*. Columbus, Ohio. State Library of Ohio, 1990.

An interesting analysis of how state tax receipts are or might be allocated to libraries. No mention is made of marketing as an expense category. Results of effective marketing (circulation, reference transactions) are often used in computing tax allocations.

D'Elia, George and Rodger, Eleanor Jo, in collaboration with University of Minnesota Center for Survey Research. *Free Library of Philadelphia Patron Survey*. Philadelphia, Pa. 1991.

Results of a study designed to determine why patrons visit the library, activities engaged in during a visit, patron evaluations of services and facilities, and patron background characteristics. Includes questionnaire, instructions, results and analysis.

Dickman, Floyd C. *Long Range Planning for Public Libraries*. Columbus, Ohio: State Library of Ohio, rev.ed., 1988

Presents a process for librarians and trustees to evaluate current services and to plan for the future library needs of their local community. This guide includes charts and background information helpful in understanding and developing the process, including references to the Ohio Library Association *Standards for Public Library Service in Ohio* and the American Library Association *Output Measures for Public Libraries*.

Douglas, Timothy. *The Complete Portfolio of Project Management Forms*. Westerbury, N.Y.: Asher-Gallant Press, 1986.

In addition to a wide variety of forms to be used in planning and executing a project, this book includes material explaining the project management process in detail.

Bibliography

Drucker, Peter F. *Managing the Non-Profit Organization*. New York: Harper Collins, 1990.

Nine experts, in addition to Drucker, address key issues in the non-profit sector in conversations with the author. Particularly germane is the discussion on marketing with Philip Kotler. Exceedingly readable.

Fleming, Maureen, et.al., eds. *The Information Industry Factbook*. 1990-1991 ed. Stanford: Digital Information Group, 1991.

A compilation of companies that sell products and services that are chiefly informational in nature. To be included in the book, the services and products "must be sold on a non-exclusive basis to any qualified group of buyers willing to pay for the information." A very resourceful documentation of trends in data base and on-line services, including many to which libraries subscribe.

Gerson, Richard F., Ph.D. *Writing and Implementing a Marketing Plan*. Crisp Publications, Inc., 1991.

Very simple guide written for small business owners. Contains outlines of a business plan and a marketing plan.

Give 'Em What They Want!: Managing the Public's Library. Baltimore County Public Library's Blue Ribbon Committee. Chicago and London. American Library Association. 1992.

Some topics discussed in detail are criteria for locating and designing facilities, methods for evaluating collection use, measuring user needs and wants, the importance of speed in delivering services and techniques for developing a common vision among staff. The underlying philosophy is that library service must be responsive to the demographic, technological, and social changes occurring in society if libraries are to survive.

Grunenwald, Joseph P. *Developing a Marketing Program for Libraries*. Clarion, Pennsylvania: Center for the Study of Rural Librarianship, Clarion State College, 1983.

Written by a marketing professor, this is a brief introductory guide to the basic elements of marketing libraries. It deals with: collecting and analyzing data; developing a marketing strategy; determining market segments and opportunities; developing, executing, and controlling a marketing plan; and evaluating the program.

Hisrich, Robert D. *Marketing*. New York: Barron's Business Library, Educational Series, Inc., 1990.

Short section on government and non-profit marketing. Straight-forward little book. Chapter on marketing research includes section on how to conduct surveys with sample questions but no complete sample questionnaire.

Kies, Cosette N. *Marketing and Public Relations for Libraries*. Library Administrative Series, No. 10. Metuchen, NJ: Scarecrow Press, 1987.

This library educator compares public relations with marketing throughout her book, indicating that public relations is considered a part of the broader marketing area. She defines terms, traces the origins of the topics, and discusses basic principles and processes. Kies illustrates how a number of public, academic, and school libraries practice marketing and public relations.

Kohn, Rita and Tepper, Krysta. *You Can Do It*. Metuchen, NJ: Scarecrow Press, Inc., 1981.

Subtitled "a PR skills manual for librarians," this volume provides practical, basic information needed to sharpen the skills necessary to make the library attractive and competitive in our visual society. For all types of libraries.

Kotler, Philip and Eduardo L. Roberto. *Social Marketing: Strategies for Changing Public Behavior*. New York: The Free Press, 1989.

Examines the art and science of promoting planned, targeted social change. It highlights successful campaigns and probes the failures. The authors present new techniques for setting measurable objectives, researching the needs of different target markets, preparing appropriate services, controlling ongoing performance and assessing results. While not specifically addressing libraries, many of the techniques are applicable.

Kotler, Philip and Alan R. Andreasen. *Strategic Marketing for Non-profit Organizations*. New Jersey. Englewood Cliffs: Prentice-Hall, 3rd ed., 1987.

In a revised and expanded edition, sophisticated concepts are presented to respond to the marketing problems of public sector organizations. Discussed are strategies for developing a philosophy, process and concept, self review through evaluation and control systems. Addressed in detail are developing customers' orientation, strategic planning, designing the marketing mix and controlling marketing strategies. Libraries (public sector organizations) are included in several discussions. Practical.

Krakow, Ira H. *Project Management with the IBM PC, Using Microsoft Project, Harvard Project Manager, VisiSchedule, and Project Scheduler*. Bowie, Maryland: Brady Communications Co., 1985.

While not up to date on the latest PM software, still a valuable text on what kinds of function to expect and how to utilize program features.

McClure, Charles R., et.al. *Planning and Role Setting for Public Libraries: A Manual of Options and Procedures*. Chicago and London: American Library Association, 1987

The authors state that the purpose is to provide public libraries with a tool to improve library management, increase overall library effectiveness and assess the quality of library effectiveness. It is general and broad in its approach to planning and allows librarians to use those techniques most appropriate to their situation and adopt other work forms and worksheets. Examples are generous.

McKnight, Cliff, Andrew Dillon and John Richardson. *Hypertext in Context*. Cambridge, England: Cambridge University Press, 1991.

One of the clearest, most interesting books on hypertext. Stresses the basic principle that hypertext is made up of information nodes and the machine-supported links between or among them. Explores some of the problems in the successful introduction of hypertext as a medium for organizing and accessing information while performing tasks. Many simple illustrations. Author covers the phenomenon of hypertext in the wider context of information storage and retrieval systems.

(State of) Minnesota. Department of Education. *Bibliography on Resource-based Teaching*. St. Paul, Minnesota: 1991.

Cites books discussing the role of the school library media specialist in curriculum planning.

(State of) Minnesota. Department of Education. *Classroom Instructional Design*. Subtitled "Tools for Teacher/Media Specialist Interaction." St. Paul, Minnesota: 1990.

This publication is intended to help school library media specialists who wish to contribute to classroom instructional design.

Ohio Library Association; Library Development Committee. *Standards for Public Library Service in Ohio*. Columbus, Ohio: Ohio Library Association, 1987.

Contains service standards from the view of Ohio residents and management standards from the view of librarians. Based upon input from public librarians on the reality of public library service in Ohio and follow up studies. Provides a method for self evaluation against a checklist.

Peters, Thomas J. *Thriving on Chaos (Handbook for a Management Revolution)*. New York: Alfred A. Knopf, Inc., 1987.

Classic Tom Peters with dozens of examples of quality improvements, reorganization, simplification, and innovation. Many references to applications in the public sector such as the "small-start strategy - a way to pilot new ideas rather than subjecting them to expensive preliminary analysis." Read selectively, the book is very valuable to library people.

Prusak, Laurence and James Matarazzo. *Information Management and Japanese Success*. Washington, D.C.: Special Libraries Association, 1992.

A short report based on interviews with eight of the largest Japanese companies and organizations. Primary finding: Japanese firms place a tremendous value on information and do not feel the need to justify information management expenditures. Prusak is from Ernst & Young; Matarazzo from Simmons College Library School.

Rosenau, Milton D. Jr. *Successful Project Management: A Step by Step Approach with Practical Examples*. New York: VanNostrand Reinhold, 1992. 2nd Edition.

A complete discussion of project management, including problem identification and analysis, financial planning and methodologies for planning, controlling and reporting progress.

Schor, Juliet B. *The Overworked American*. New York: Basic Books, 1992.

Sub-titled: "The Unexpected Decline of Leisure." Harvard economist Schor has made extensive measurements and found that over the past 20 years an average American worker has increased paid annual labor by 164 hours, equivalent to another month on the job. By implication, libraries could be among those losing out.

Van House, A. Nancy., et.al. *Output Measures for Public Libraries*. 2nd ed. Chicago and London: American Library Association, 1987.

Walters, Suzanne. *Marketing: A How-to-do-it Manual for Libraries*. N.Y., London. Neal-Schuman, 1992.

Examines marketing as a process to understanding the customer and provides guidance from the concept through the development and implementation of the plan. Sample marketing plans are included as well as work sheets, charts, and diagrams. The orientation is toward public libraries.

Weiers, Ronald M. *Marketing Research*. 2nd ed. Englewood Cliffs, NJ: Prentice Hall, 1988.

A college textbook with considerable detail on survey design, interviews, consumer panels. Extensive treatment with considerable detail on sampling techniques. Includes several sample questionnaires.

Weingand, Darlene E. *Administration of the Small Public Library*. 3rd Ed. Chicago and London. American Library Association, 1992.

A revision of a classic text in the field. Incorporates new concepts and techniques that have occurred since 1979 which contribute to changed expectations of the public library. To help librarians respond, an emphasis on marketing techniques appears throughout.

Weingand, Darlene E. *Marketing/Planning Library and Information Services*. Englewood, Colorado: Libraries Unlimited, 1987.

Weingand recognizes marketing as a management tool, emphasizes performing a marketing audit before planning the marketing mix and notes the importance of an evaluation afterward. She integrates marketing with planning and discusses in detail the mission, setting goals and objectives, and planning action strategies. She also explains product, price, place/distribution, and promotion. A final chapter centers on pitfalls that should be avoided, cited by business executives, but recognizable in a library setting. Instructional approach.

Weiss, Michael J. *The Clustering of America*. New York: Harper & Row, 1988.

The basic text on market segmentation dividing the country into 40 neighborhood types with colorful terms such as Bohemian Mix, Norma Rae-ville and Donna Reed Redux oriented toward consumer products, focusing on values, lifestyles and eccentricities. Easy to read, as well as entertaining.

Westin, Allan F. and Anne L. Finger. *Using the Public Library in the Computer Age*. Chicago and London: American Library Association, 1991.

A sophisticated overview of how the public library has expanded its resources to adapt to the computer age as its usage has increased. Included is the Equifax-Harris survey in detailed analysis with numerous tables. Library users have increased to 66%, 15% higher than the 1978 Gallup survey. Includes descriptions of new computer systems such as Neighbor LINE that illustrates the technological readiness of library computers. Emphasizes the senior citizen dimension and targets other groups whose library usage is minimal.

Wood, Elizabeth J. and Victoria L. Young. *Strategic Marketing for Libraries: A Handbook*. Westport, Connecticut: Greenwood Press, 1988.

Marketing principles and library strategic planning. The authors suggest that libraries concentrate their efforts using a consumer orientation, paying close attention to individual preferences. Steps are outlined to identify target markets (potential customers) as a way to manage library budgets more efficiently and advance the library's goals more effectively. Bibliographies at the end of each chapter. Thirty page Appendix with detailed plans of Kansas City and Pasadena public libraries. Readable.

Zemke, Ron with Dick Schaaf. *The Service Edge: 101 Companies That Profit From Customer Care*. New York: New American Library, 1989.

With a forward by Tom Peters and in his style, the book deals with service organizations. There are 101 profiles with laudable examples of service. While most of them do not bear directly on libraries the overall tone of superior service is interesting and useful. Several Ohio profiles are included, among them, Riverside Methodist Hospital (Columbus), Montgomery County and CompuServe.

ARTICLES AND MANUALS

Anderson, A.J., "How Do You Manage?" *Library Journal* March 1, 1992: pp. 62-64.

This long running feature column addresses "Why Isn't the Public Library an Essential Service?" A case study of a public library facing a 40% cut in the budget because it was not considered as important as police, fire, public works and schools. Two analyzes discuss and point up how the lack of marketing done by the director led to the sad, almost irreversible decision by the city manager. Some suggestions to change people's opinions are given. The lesson here is obvious.

Berkowitz, Robert E. and Berkowitz, Joyce B., "Marketing the School Library: A Process for Success," *The Book Report* May-June 1987: pp. 12-23.

The authors present eight steps to use in marketing the school library: create your vision, recreate the vision, develop goals jointly, define target groups, develop your marketing plan, analyze resources, implement the vision, and evaluate and seek recommitment. This approach assisted one school librarian in getting a new library, acquiring a three hundred percent increase in budget allocations, and purchasing numerous pieces of equipment.

Bussey, Holly, ed. "Public Relations in Special Libraries," *Special Libraries* Summer 1991. pp. 149-201.

This special issue is devoted entirely to public relations strategies and concepts, applicable to any organization. Covered are such topics as the difference between marketing and public relations, basic PR techniques and how they can be applied in a library/information center setting. Included are case studies that will provide ideas and approaches for creating a PR plan. Further, bibliographies are included for additional information on the topic.

Butler, Meredith, and Gratch, Bonnie, "Planning A User Study - The Process Defined," *College & Research Libraries* July 1982: pp. 320-330.

Using the process that was followed by a college library, the authors outline and define a step-by-step planning process for preparing a user study. They begin with identifying the problem and setting objectives, and continue through development of the questionnaire and analyzing data.

Coffman, Steve and Helen Josephine, "Doing It for Money," *Library Journal* October 15, 1991: pp. 32-36.

Covers the means of operating for-fee reference and research services. Both authors head fee-based services: Coffman at County of Los Angeles Public Library; Josephine at Arizona State University. They appear to advocate and practice as theory that fees are set "on a full cost-recovery basis, but are not intended to make a profit." No indication of whether it works out that way. Describes services that have "hustle"; i.e., short deadlines, overtime work, FAX/Fed Ex delivery, ability to tap resources; other similar services. Article lacks information on marketing this service.

Coover, Robert, "The End of Books," *New York Times Book Review* June 21, 1992: pp. 1, 23-25.

The concept of hypertext in relation to writing fiction is explored. The Brown University Hypertext Fiction Workshop is discussed in some detail to illustrate the positive and negative aspects of this new creative tool.

D'Elia, George, Eleanor Jo Rodger and Carole Williams, "Involving Patrons in the Role-Setting Process," *Public Libraries* November-December 1991: pp. 338-345.

Describes procedures for involving patrons in evaluation of library roles and effectiveness. Group interviews and patron surveys from St. Paul Public Library in Minnesota indicate a special importance to the role of the library as a reference and a research center.

Drucker, Peter F., "It Profits Us to Strengthen Nonprofits," *Wall Street Journal* December 19, 1991: p. 14A.

Nonprofits spend far less for success than government for failures, getting at least twice the value for each dollar, especially in areas of education and rehabilitation. Nonprofits provide volunteer work for some 90 million Americans, are as large or larger than some Fortune 500 companies, and are just as innovative. Three things are needed to realize nonprofit potential: 1) better self-management, 2) better money raising methods, emphasizing successes rather than needs, and 3) a change in the hostile attitudes of government bureaucracies toward nonprofits. Nonprofitization may be the way out of mismanagement for welfare bureaucracies.

Ford Motor Company, "Quality System Standard," January 1986.

Ford's guide for their manufacturing divisions and outside suppliers of production and service products. Strong emphasis on the marketing principle that quality is essential to customer satisfaction. Also highlighted are Ford's fundamental success values: People, products, and profits.

General Motors, *Standard for Supplier Performance Evaluation and Reporting* Detroit: Supplier Development Administration, 1987.

General Motors' manual for manufacturing divisions and outside suppliers of production material and service products. Broken down into "6 targets for excellence" areas such as continuous improvement, management, and technology. Manual also includes numerous questionnaires such as self-assessment. Strong emphasis on the marketing principle that quality is essential to customer satisfaction.

Giesecke, Joan, "Marketing Without a Plan: Seizing Outreach Opportunities As They Appear," *Nebraska Library Association Quarterly*, Summer 1990: pp 5-10.

This prize-winning article recommends an informal approach to marketing rather than lamenting the lack of funds to develop a structural marketing and evaluation plan. In order to convey the importance of marketing, the principles and techniques of a plan are first discussed. The authors, members of the University of Nebraska - Lincoln Libraries staff, then discuss the need to adopt flexible, unplanned strategies; to experiment with more risky ideas; and to add elements of action first, evaluation second. They discuss the importance of administrative support and the freedom to act without pre-approval when necessary.

Gothberg, Helen M., "Time Management in Public Libraries: A Study of Public Libraries," *Public Libraries* November-December 1991: pp. 350-357.

Directors of larger public libraries provide data on their time-management practices. Attention must focus on improved organizational patterns. Remarkably, the division of time spent on management activities by directors shows no time allotted for marketing.

Grunenwald, Joseph P., and Traynor, Kenneth, "A Marketing Plan for the Law Library," *Law Library Journal* Winter 1987: pp. 93-101.

Two marketing professors develop guidelines for a law library marketing plan. Discussion includes: preparing a patron profile; establishing goals for the program; and developing a marketing program around the four elements of product/service, price, physical delivery system, and promotion techniques. The authors emphasize the importance of determining and satisfying the needs of patrons.

Marshall, Joanne G. (compiler), "Evaluation Instruments for Health Sciences Libraries," DocKit #2 Chicago, *Medical Library Association*, 1990

This loose-leaf manual is a packet of unedited sample documents on various topics pertinent to the management of health sciences libraries. It contains 289 pages of questionnaires for use by others. All are for health sciences use but could be modified for use elsewhere. Many user survey forms are included. Compiler is a faculty member at University of Toronto.

Murphy, Kent R., "Marketing and Library Management," *Library Administration and Management*, Summer 1991: pp. 155-158.

Addresses the lack of marketing effort in libraries and the reasons. Murphy explains the importance of adopting a marketing approach; changes in the resource and sociopolitical environment, the competitive market and public policy environments; increasing dependency on technology, new types of resources, new services, competition in the information explosion, and a service-oriented economy resulting in the need for more information. These facts point to the management of change as libraries evaluate the various environments, identify user needs - in short, adopt a marketing concept. Murphy is acting Dean for Finance at Arizona State University Libraries, Tempe, Arizona.

Popovich, Charles J., ed. "Fee-based Information Services in Academic and Public Libraries," *Drexel Library Quarterly*, Fall 1983: pp 1-92.

This issue of the *Quarterly* presents various aspects of public and academic libraries offering fee-based services to businesses, nonprofit groups and individuals. Articles cover: establishing a fee-based service; advice on administrative techniques; services offered; internal operations; fees; marketing and client relations; collection development suggestions; and surveys of academic and public libraries.

Robinson, Charles. "The Public Library Vanishes." *Library Journal* March 15, 1992. pp. 51-54.

The provocative director of the Baltimore County Public Library reminds librarians to look to the future and how information will be provided to prepare for the changes that will inevitably occur.

Shimpock-Vieweg, Kathy, "How to Develop a Marketing Plan for a Law Firm Library," *Law Library Journal* 84 no. 1 (1992): 67-91.

This article describes the importance of marketing to a law firm library in particular, yet provides a basic marketing plan description applicable to most other types of libraries. The author defines the various components essential for effective marketing and offers suggestions, examples, and questions to help develop a comprehensive marketing plan. The appendix includes a nine page sample plan, a revised version of which appears as an exhibit in this workbook.

Teuton, Luella Bosman, "Marketing the College Library," *College and Research Libraries News* December 1990: pp. 1073-74.

The Head Librarian of Smith Florida College provides a simple, straight forward explanation and rationale for developing a marketing program. She points to the effect of marketing and promotion of the product (service and collections) as a way to obtain needed financial backing.

Van Auken, Robert W. (Chairman), *Ohio's Best Bringing Out the Best in Ohio*, Columbus: Operations Improvement Task Force, 1991.

Report of the governor's commission on operations improvement with very large savings deemed possible. Agency by agency review with, unfortunately, no direct mention of libraries either pro or con. Calls for surveys to determine "the services needed by the people of Ohio." If such surveys are ever made, libraries must be included.

"What Works: Spotlighting Classroom Successes," Education Life, *New York Times* January 5, 1992: 1-60.

Compilation of articles by thirteen educators and specialists pertaining to the improvement of elementary and secondary public school education with no specific mention or reference to integration of libraries into the curriculum.

AUDIO TAPES

Marketing Tools for Better Public Library Decisions. Plan Library Services. Public Library Association, 1990. A program at Public Library Association conference April 5, 1986. 2 cassettes.

Marketing is explored in depth, discussing the rationale for and meaning of marketing. The importance of well executed marketing plans for libraries is stressed. Presented by a businessman, a marketing professor and a public library director.

All Things to All People? Forget It! Using Market Segmentation and Target Markets to Plan Library Services. Plan Library Services, Public Library Association, 1990. 2 cassettes

Suggestions on using demographics to assist in public library role selection and implementation from experts in the field of marketing and libraries. From a PLA conference. This tape includes a detailed marketing plan based on identifying a specific market segment.

INTERVIEW LIST

The authors gratefully acknowledge the assistance obtained through interviews, by telephone or in person, with the following individuals. Further, the authors recognize the assistance received from many members of the State Library of Ohio staff and, of course, those listed elsewhere as test sites or members of review committees. Affiliations listed were current at the time of interview.

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FIELD TEST LIBRARIES

The seventeen Ohio libraries and their staff listed below carried out a working test of this handbook when in draft form. Suggestions developed over the five month test period were extremely helpful in preparing the final version of the handbook. Their assistance is most appreciated.

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